

# HRMS End User Training



## HRMS Basics & Reporting Training Guide

# Introduction

# Course Objectives

**At the end of this course you will be able to:**

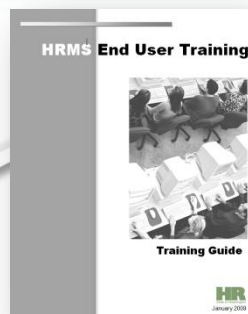
- Log on/log off HRMS
- Use different HRMS screen elements
- Describe the organization of functional areas in HRMS
- Understand the different types of HRMS fields
- Customize the appearance of HRMS
- Describe HRMS system messages
- Access and navigate in OLQR
- Understand how to access and run HRMS reports

# HRMS Training Materials and Tools

## Training Guide

*A copy has been provided to you*

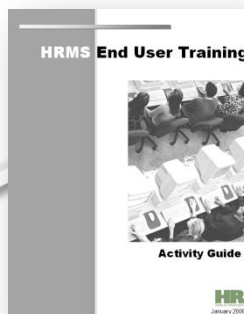
Designed to introduce you to the basic HRMS navigation terms and concepts and to provide the necessary information to complete the activities throughout the HRMS Basics & Reporting course.



## Activity Guide

*A copy has been provided to you*

Designed to provide you with activities that will help solidify your understanding of concepts learned in the course and also provide you with an opportunity to use HRMS.



## Job Aids

Designed to provide you with reference materials so you can quickly access relevant HRMS information.

A binder of all job aids is available during class time. You can print a copy



## On-line Quick Reference (OLQR)

On-line help procedures that provide step-by-step instructions designed to help you complete tasks in HRMS.

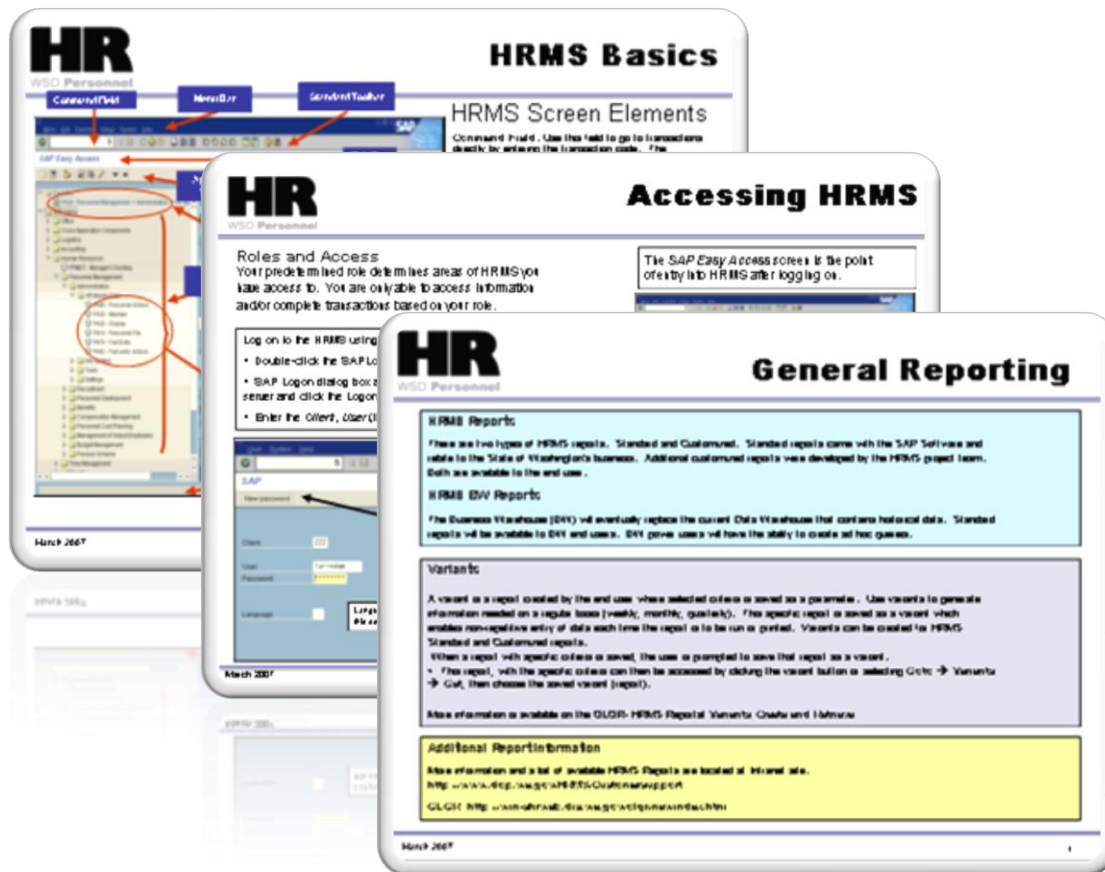
This is an online resource available 24/7.



# Job Aids

The following job aids are available to you and are applicable to HRMS Basics:

- HRMS Basics
- Accessing HRMS
- General Reporting
- Inquirer Roles
- Supervisor Roles



Web address:

<http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/default.aspx>

# Create your own Job Aid binder!

Follow these instructions to print your own copy of the job aids for this course:

- From your internet browser go to [www.dop.wa.gov](http://www.dop.wa.gov)
- Select the **Payroll** tab
- Locate **Human Resource Management System**
  - Select **On-Line Quick Reference**
- Select **Job Aids**
- View the list of job aids and print one or all!
  - Note: You have a choice of .ppt or .pdf formats



Web address:

<http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/default.aspx>

# End User Roles

HRMS end user roles determine what activities can be performed when using the system; what part of the system a user has access to; and what training end users need to perform their new roles successfully.

The below was taken from the HRMS Centralized Role Definition Handbook

- During the HRMS Role Definition Workshops, a “role” was defined as a major grouping of activities that reflect a specific aspect of a person’s job.
- While a role may have several activities aligned to it, an activity can only be aligned with one role.
- A person may be assigned one or more roles, and roles can be assigned to one or more persons.


# Launching HRMS

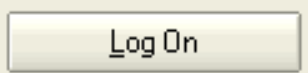


# Logon Information

- To logon to HRMS, you must log on to the system. To log on to HRMS, you need a user ID and password.
- In order to secure HRMS from unauthorized access, user IDs and passwords are only provided to authorized users of the system.
- User IDs and passwords are managed at the agency level.
  - Questions and concerns regarding passwords can be directed to agency userID administrators.

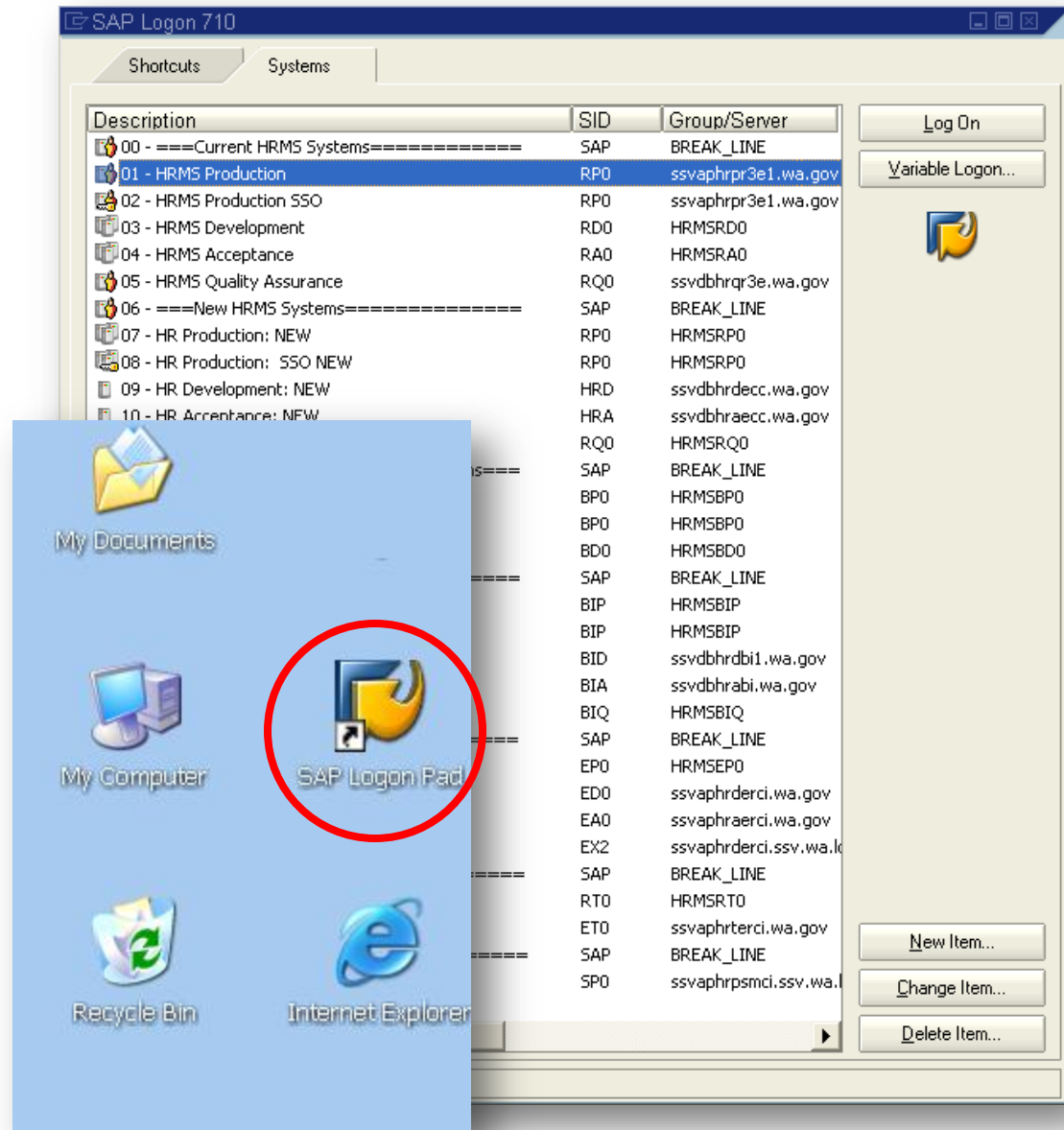
# Logon Procedures

- Locate and double-click on the  (SAP Logon icon)

- Highlight the server description applicable to your agency and click  (Log On)


OR

- Double-click on the server description to launch

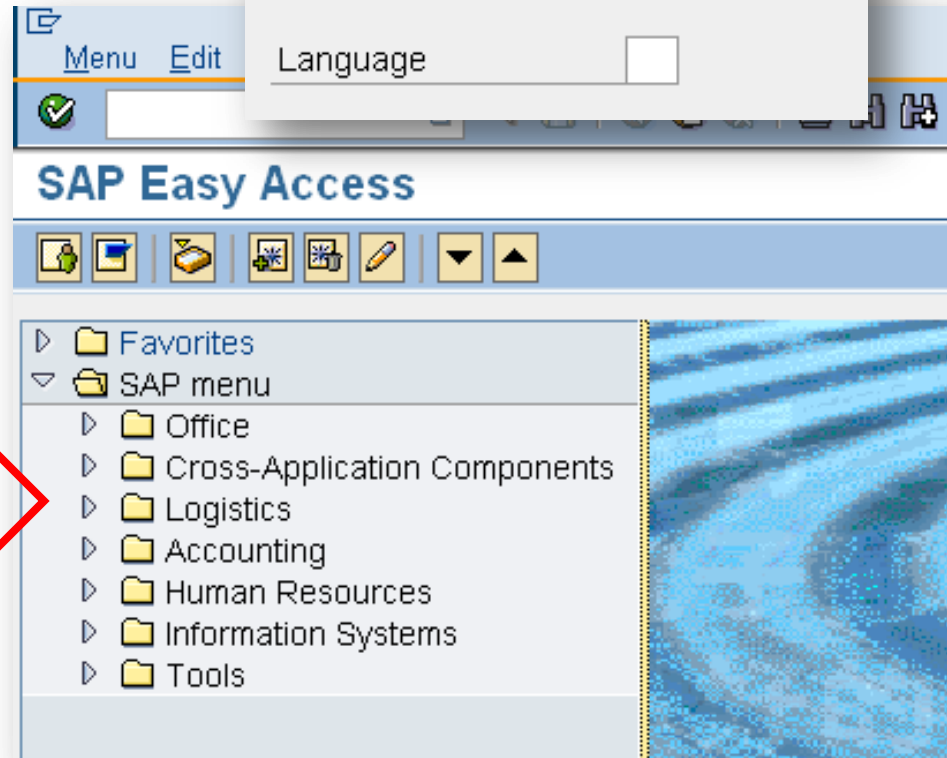
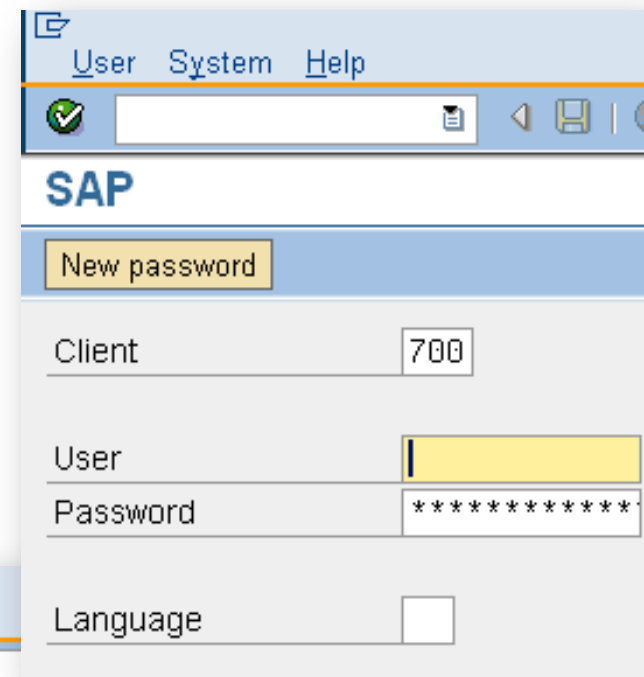
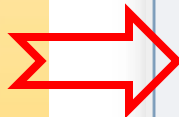


# Logon Procedures (con't)

There are four fields on the SAP Logon screen. **Three** are required.

- Enter the **Client** (number)
- Enter your **User** (id)
- Enter your **Password**
- The Language field defaults to English
- Click  (**Enter**) or press Enter on your keyboard.

Note: If you are a single sign on agency you bypass logging in and go directly to the SAP easy access screen.



# Accessing HRMS through Web Access

- To access the HRMS Portal, open Internet Explorer from your desktop and type in the web address in the address field <https://wahrms.wa.gov>



Agency's access the portal differently. Your agency access may look different than this example.

The screenshot shows the "My Address - Washington State's Human Resource Management Systems" web application running in Internet Explorer. The browser's address bar displays the URL "https://wahrms.wa.gov". The page features a navigation menu with options like "Employee Self Service" and "My Career". A sidebar on the left contains a "Detailed Navigation" section with links to "My Address", "Emergency Contact", and "Email Update", as well as a "Portal Favorites" section. The main content area displays a "SAP NetWeaver™ SAP Web Application Server" login form. This form includes fields for "System" (RP0), "Client" (700), "User", and "Password", each with a "Via Popup" button. It also has a "Language" dropdown set to "English", an "Accessibility" checkbox, and a "Log On" button. A warning message states: "SSO logon not possible; browser logon ticket cannot be accepted". Below the login fields is a "Change Password" link. The footer contains the copyright notice "Copyright 2002-2005 SAP AG All Rights Reserved" and the SAP logo.

# Changing Passwords

As part of the security process, when you first log on to in HRMS, the system prompts you to change your password.

A generic password is given to you the first time you access HRMS. When you log on for the first time, you need to change that password.

Passwords protect the system against unauthorized access, therefore, it is important to keep your **password confidential**.

Passwords must be changed every 90 days or they will expire.



# Changing Passwords (con't)

- To change your password, complete all of the fields on the *SAP Log on* screen then

1. Click the **New password** button
- or
2. Press the F5 key on your keyboard to access the **New password** box

The image displays two screenshots of the SAP Log On interface. The top screenshot is a 'New Password' dialog box with the following fields:


- New Password:** A text field filled with asterisks.
- Repeat Password:** A text field filled with asterisks.
- Entry is Case-Sensitive:** A checkbox that is currently checked.
- Status Bar:** Contains a green checkmark icon and a red 'X' icon.

The bottom screenshot is the main SAP Log On screen. It features a menu bar with 'User', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main area contains the following fields:

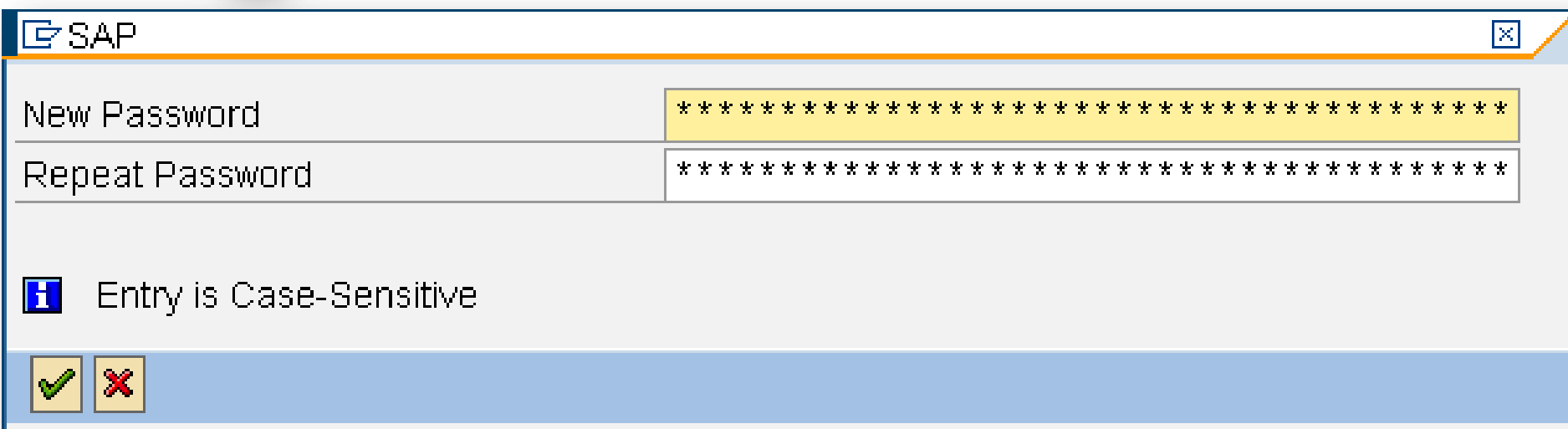
- Client:** A text field.
- User:** A text field.
- Password:** A text field filled with asterisks.
- Language:** A text field.
- Information Panel:** Displays 'ZZZ HRMS Training Environment'.

A red arrow points from the 'New password' button in the bottom screenshot to the 'New Password' dialog box in the top screenshot.

# Changing Passwords (con't)

2. In the **New password** field, enter a New password of your choice
3. In the **Repeat password** field, re-enter your New password
4. Click  (**Enter**)


**Important Guidelines:** Your password must be 8 characters. It must contain at least one capital letter (A-Z), one numerical character (0-9), and one symbol (e.g. \$%^&).





SAP

New Password \*\*\*\*\*




Repeat Password \*\*\*\*\*

 Entry is Case-Sensitive

# Log Off Procedures

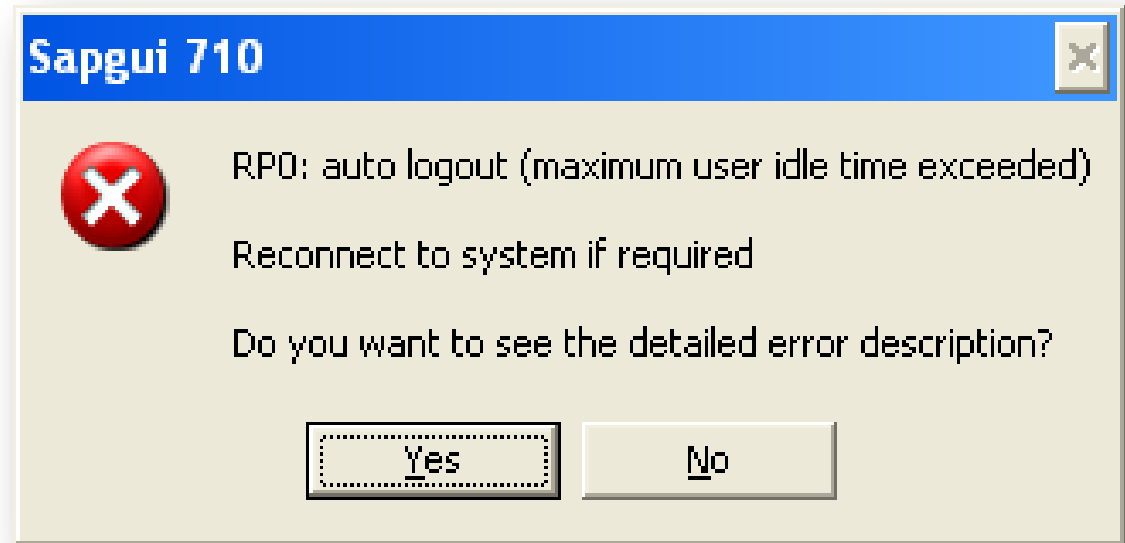
There are three different ways to log off HRMS.

Procedure	View	Description
Click the X button		On the top right corner of the window, click the X button.
Use the Menu bar		From the Menu bar, select System. Scroll down and select Log off. The Menu bar will be demonstrated later.
Use the Exit button		From the SAP Easy Access screen, click the Exit button on the Standard Toolbar. The Standard Toolbar will be discussed later.



# Automatic Log Off

- If the system is left idle with no user input, the system will time out and a pop-up message will appear.
- The standard idle time for is set at 30 minutes.
  - Your idle time may be different
- To begin work in the system again, log in.



# HRMS Activity



**Log on and Log off HRMS  
Activity Packet - Page 4**

# Review

1. Identify the *required* fields on the SAP Logon screen.

- a. Client field
- b. User field
- c. Password field
- d. Language field

2. How do you access the New Password pop-up box?

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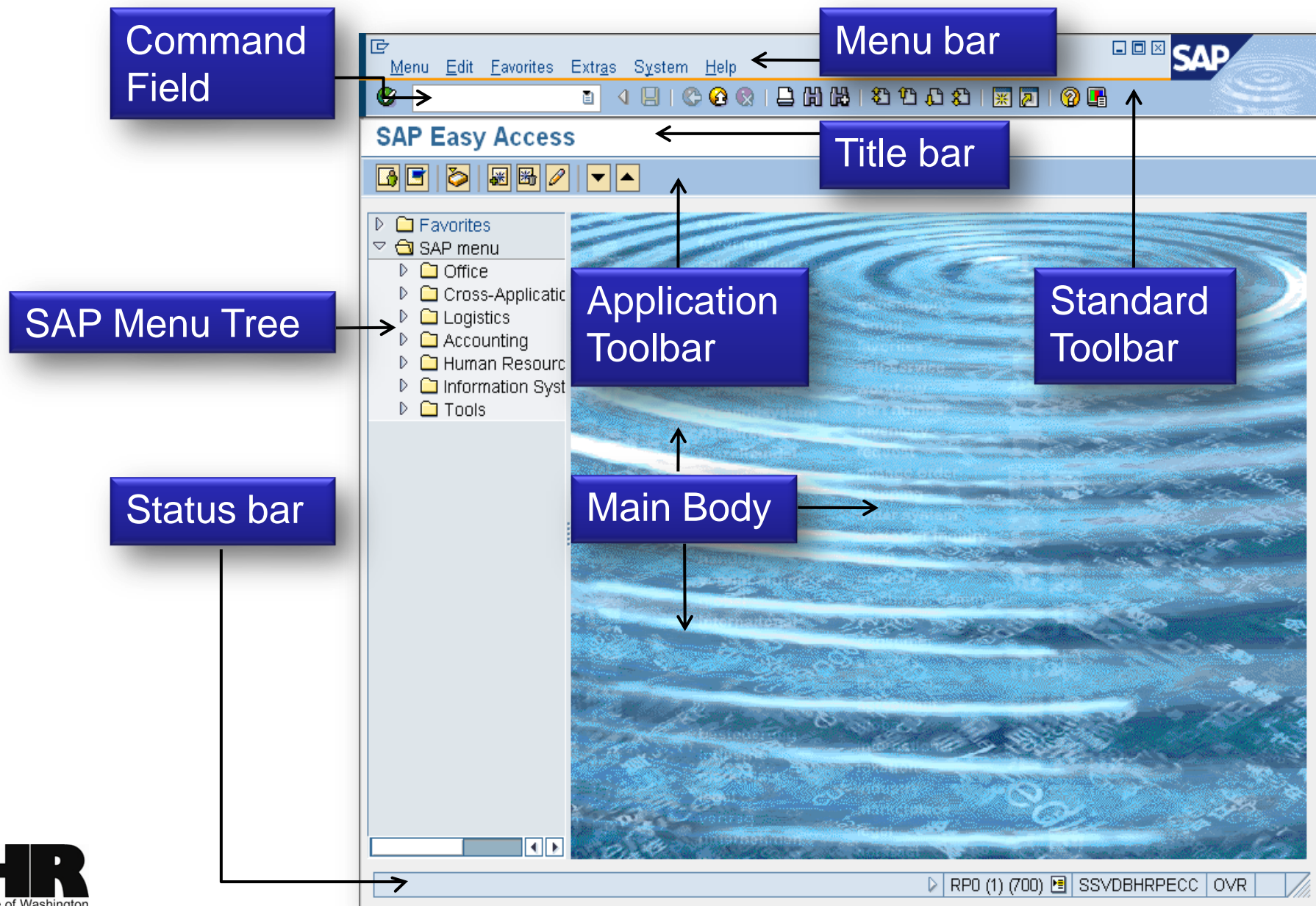
3. What determines your access to HRMS?

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# HRMS Screen Elements

# HRMS Screen Elements



# Menu Bar






The Menu bar is located at the top of the screen. When clicked, a drop-down menu appears prompting the user to select an option.





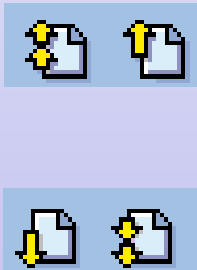



Menu   Edit   Favorites   Extras   System   Help

Selection	Description
<u>M</u> enu	Used to access the user menu and HRMS menu.
<u>E</u> dit	Used to execute a transaction in a current or new window or create a shortcut on your desktop.
<u>F</u> avorites	Used to maintain a list of your commonly used transactions.
<u>E</u> xtras	Used to display documentation and set various system settings.
<u>S</u> ystem	Used to customize the system or create a new session.
<u>H</u> elp	Used to select HRMS Help which provides access to the On-Line Quick Reference (OLQR).

# Standard Toolbar Buttons

Button	View	Description
Enter button		The Enter button validates that required fields have been entered before continuing to the next infotype.
Save button		The Save button stores changes in the system.
Back button		The Back button navigates to the last page you were on prior to the transaction you are currently in.
Exit button		The Exit button navigates out of the transaction you are currently working in and back to the SAP Easy Access screen. <u>All unsaved data is lost when using the Exit button. You will get a warning to save your data.</u>
Cancel button		The Cancel button navigates out of the transaction you are currently working in and back to the SAP Easy Access screen. <u>Like the Exit button all unsaved data is lost when using the Cancel button, however, you do not get a warning to save.</u>

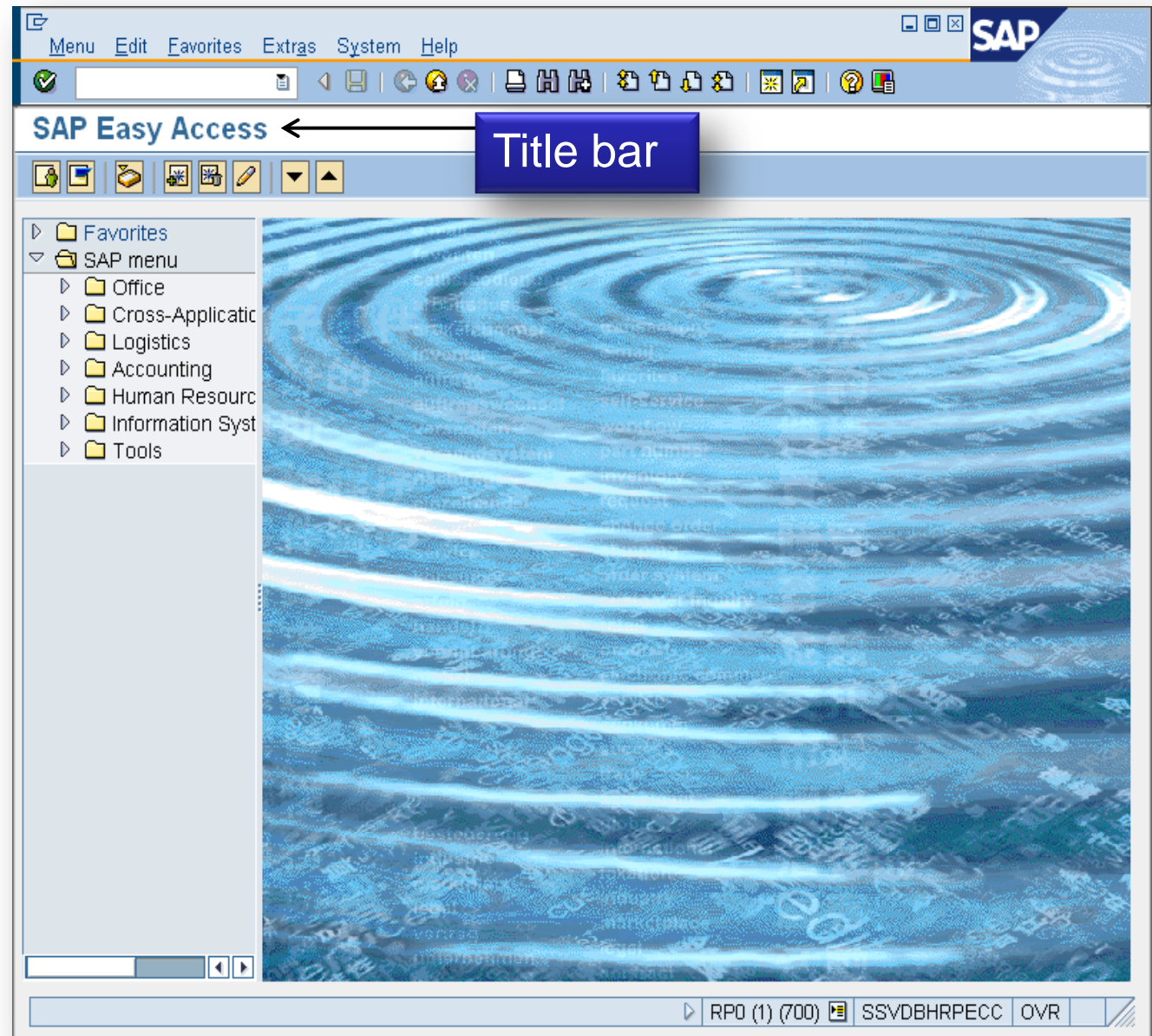
# Standard Toolbar Buttons

Button	View	Description
Print button		The Print button allows you to print the data displayed on your screen.
Find/Find Next buttons		The Find buttons allow you to find specific words within the screen you are currently on.
Page Up/Down buttons		The Page Up/Down buttons allow you to navigate page by page within your session. The two arrows pointing up button navigates to the first page of your document. A single arrow up button navigates up one page in your document. The two arrows pointing down button navigates to the last page of your document, while the single arrow pointing down button navigates to the next page of your document.
New Session button		The New Session button creates a new session.
Shortcut button		The Shortcut button creates a shortcut to your desktop. You can create a shortcut to a specific transaction or infotype.
Local Layout button		The Local Layout button allows you to customize the way your HRMS desktop version looks.









# Title Bar

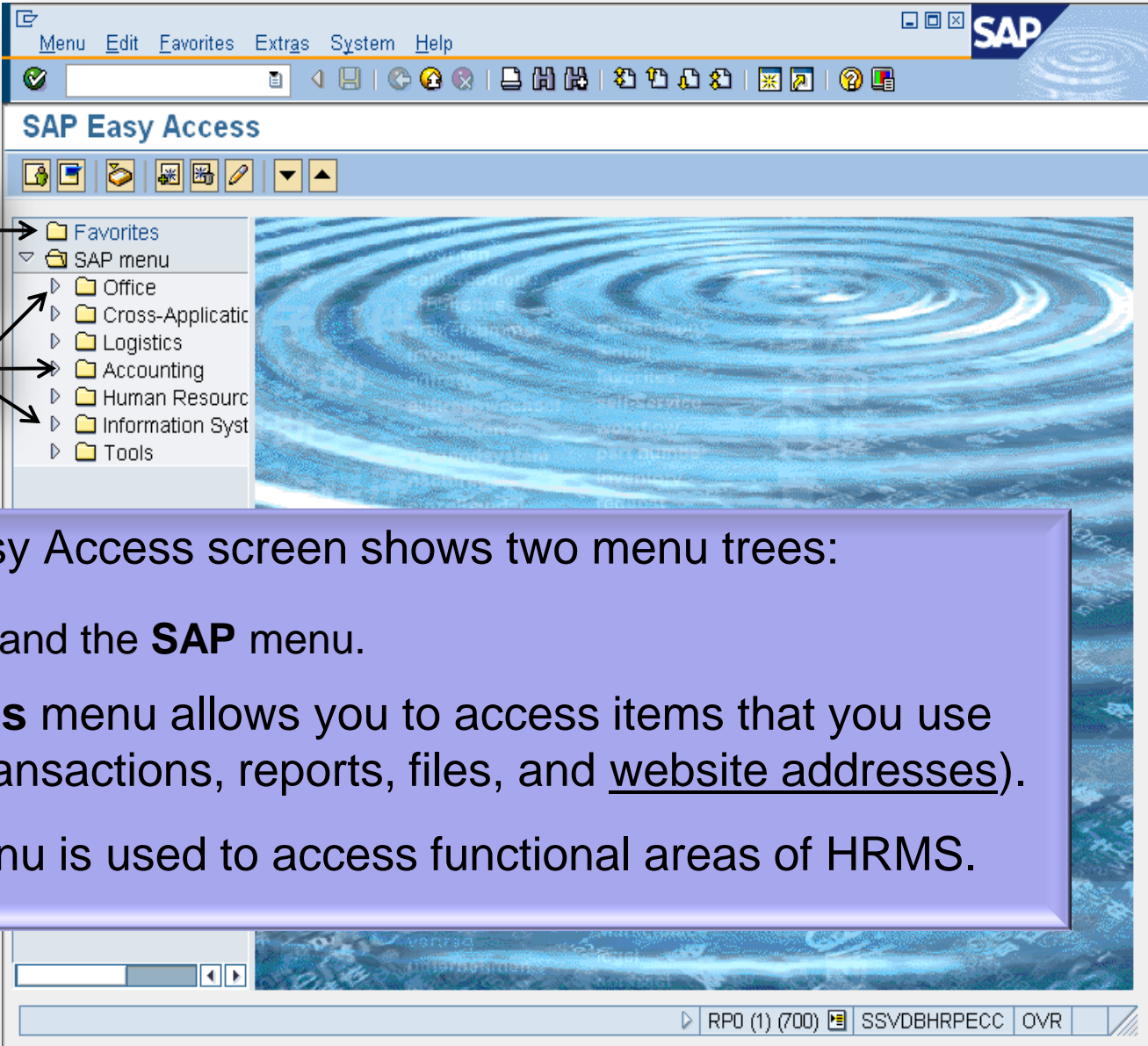
- The Title Bar shows the title of the current screen you are working in. It also displays infotype and report names.
- This example illustrates that you are working in the SAP Easy Access screen.



# Application Toolbar

Button	View	Description
User Menu button		The User Menu button is specific to you when logged on HRMS. From the User Menu, you can create a Favorites list consisting of the transactions, reports, and web addresses you use frequently.
Standard Menu button		The Standard Menu button shows a complete overview of HRMS. You can see transactions for all modules/roles; however, you only have access to those transactions in your user menu.
Add to Favorites		The Add to Favorites button allows you to add frequently used transactions and website links to your Favorites folder.
Execute		The Execute button triggers the processing of transactions, e.g. New Hire action, processing transactions, or running reports.
Display		The Display button will allow you view a specific record in an infotype when selected.
Overview		The Overview button shows a list of records created for an infotype

# SAP Menu Tree



The screenshot shows the SAP Easy Access interface. On the left, there is a 'Favorites Menu Tree' and an 'SAP Menu Tree'. The 'Favorites Menu Tree' is a blue box with the text 'Favorites Menu Tree' and an arrow pointing to the 'Favorites' folder in the left-hand menu. The 'SAP Menu Tree' is a blue box with the text 'SAP Menu Tree' and three arrows pointing to the 'SAP menu' folder and its subfolders: 'Office', 'Cross-Applicatic', and 'Logistics'. The main area of the screen displays a large blue graphic with concentric circles. The top of the screen shows the SAP logo and a menu bar with 'Menu', 'Edit', 'Favorites', 'Extras', 'System', and 'Help'. The bottom of the screen shows a status bar with 'RPD (1) (700)', 'SSVDBHRPECC', and 'OVR'.

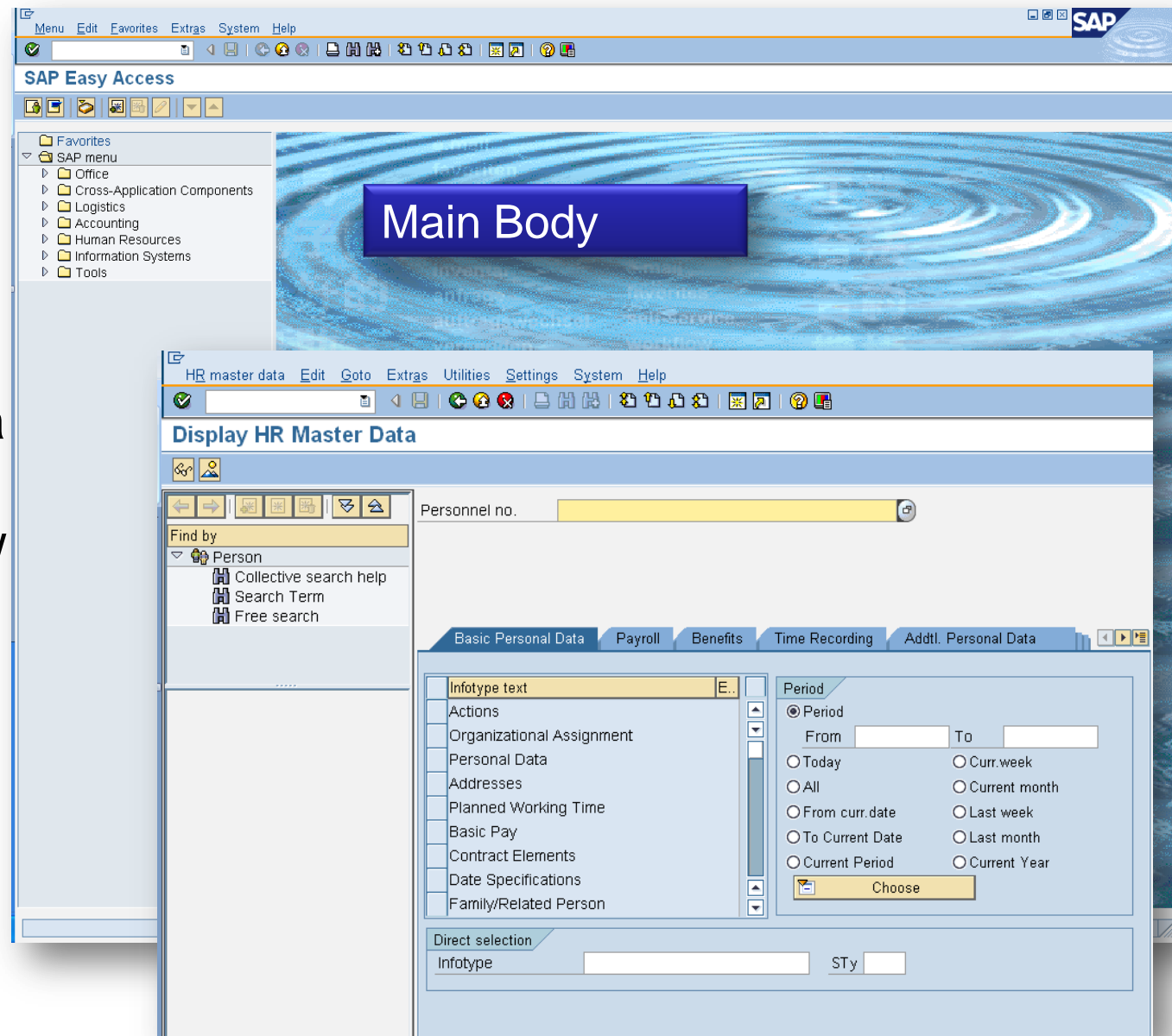
**Favorites Menu Tree**

**SAP Menu Tree**

- The SAP Easy Access screen shows two menu trees:
  - **Favorites** and the **SAP** menu.
- The **Favorites** menu allows you to access items that you use frequently (transactions, reports, files, and website addresses).
- The **SAP** menu is used to access functional areas of HRMS.

# Main Body

- The Main body is the largest part of the screen.
- The Main body changes from a water view to the screen view once a transaction is entered in the command field.

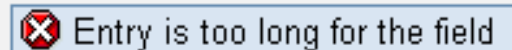




# Status Bar

The Status Bar displays at the bottom of the screen. This is where system messages are displayed. Examples of system messages are: Error, Warning, Information.

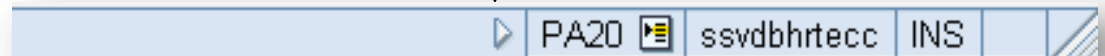
Toggle button displays/hides the information on right side of the Status Bar



Entry is too long for the field

Displays messages:

- ✓ Errors
- ✓ Warnings
- ✓ Informational



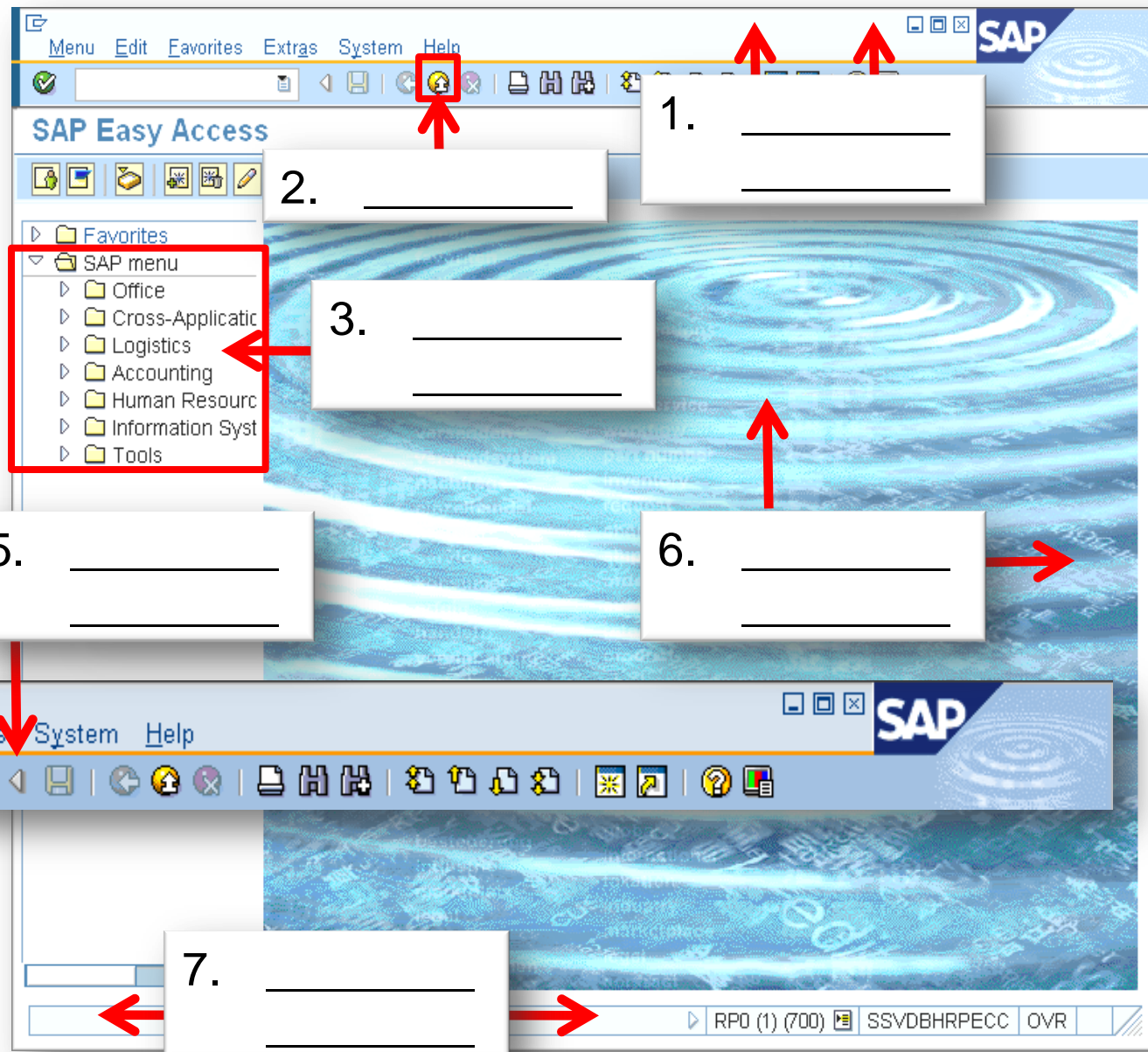
PA20 ssvdbhrtecc INS

Displays the current system and database

Displays Insert (**INS**) or Overtyping (**OVR**) mode

# Let's Review!

Identify the name for the highlighted item and fill in your course guide.



# Content Organization

# Key Terms

Key Terms that you will use and become familiar with in HRMS Basics.

Term	Definition
Transaction	A process that an end user performs to complete a business task, such as displaying employee information. Each transaction is assigned a <i>transaction code</i>
Transaction Code	A code that provides end users access to the initial screen of a transaction, or specific area of HRMS to view business related information and/or to perform business related tasks (based on assigned roles).
Infotype	Screens within a transaction in which specific criteria is entered into individual employee files or records. An example of an infotype is IT0007, ( <i>Planned Working Time</i> ) – this displays the selected employees work schedule.
Matchcode	A dropdown list of possible entries for specific areas of an infotype.
Variant	A customized report with specific criteria. This function allows you to use the same report on a regular basis without the reentering key data each time the report is needed.
On-line Quick Reference (OLQR)	Online help procedures and reference tool designed to help users complete business tasks. <a href="http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/default.aspx">http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/default.aspx</a>



# HRMS Content Organization

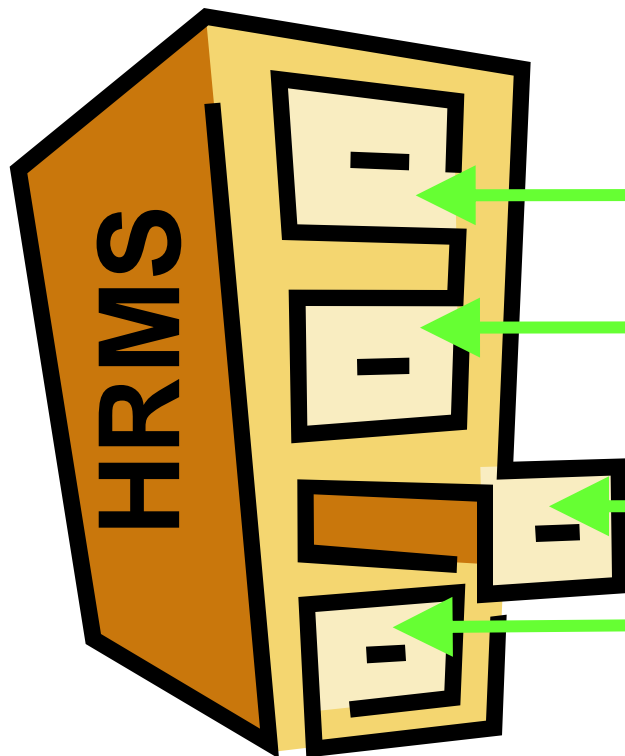
## Transaction (folders)

Display HR Master Data  
(PA20)



## Infotype (documents)

Personal Data (0002)



## Functional Areas (drawers)

- Payroll
- Personnel Management
- Time Management
- Org. Management

# SAP/HRMS Menu

The menu consists of seven folders. Each folder covers a different aspect of business.

The Human Resources folder has six folders. Each folder is associated to a different functional area.

For employee security, access to transactions within folders is determined by role assignment.

For example, a Personnel Administration Inquirer receives access to transactions in the Personnel Management folder.



# HRMS Menu

HRMS roles are categorized into four major functional areas. This table identifies the areas that roles can access.

- ▶ Personnel Management
- ▶ Time Management
- ▶ Payroll
- ▶ Organizational Management

Folder	Roles
Personnel Management	Personnel Administration Inquirer, Personnel Administration Processor, Personnel Administration Supervisor, Payroll Inquirer, Payroll Processor, Payroll Supervisor, Payroll Analyst, Payroll Supervisor, Garnishment Administrator, Time and Attendance Processor, Time and Attendance Supervisor, Time and Attendance Inquirer, Organizational Management Processor
Time Management	Time and Attendance Processor, Time and Attendance Supervisor, Time and Attendance Inquirer
Payroll	Payroll Processor, Payroll Analyst, Payroll Supervisor, Payroll Inquirer, Garnishment Administrator, Time and Attendance Processor, Time and Attendance Supervisor, Time and Attendance Inquirer
Organizational Management	Organizational Management Processor

# Review

## 1. Identify the four major folders on the HRMS menu.

- a. Personnel Management
- b. Payroll
- c. HR Master Data
- d. Time Management
- e. Organizational Management

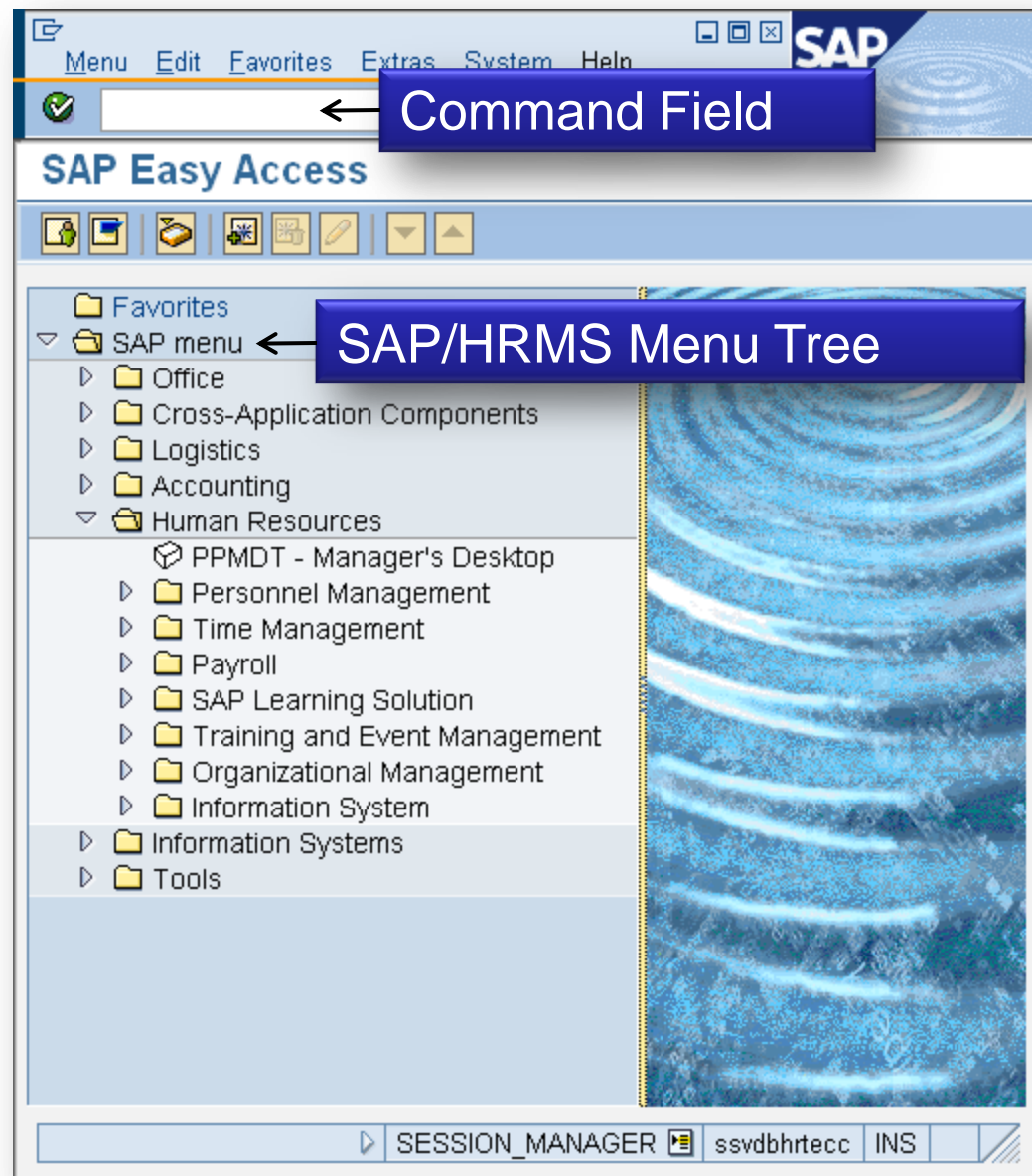
## 2. True or False?

HRMS allows for two end-users to update the same employee record simultaneously.

# Basic Navigation

# Accessing Transactions

- A transaction is a set of processes used to complete a business task, such as viewing employee information.
- There are two ways to access transactions in HRMS.
  - HRMS menu (SAP menu)
  - or*
  - Command Field



# SAP/HRMS Menu Tree

The HRMS menu on the SAP Easy Access screen allows you to navigate to transactions within HRMS.

Each transaction in HRMS is assigned a transaction code. These codes provide you access to a transaction's initial screen.

Transaction codes can be initiated by double clicking a folder until the "cubes" display indicating transactions. This is called the 'drill-down' method.





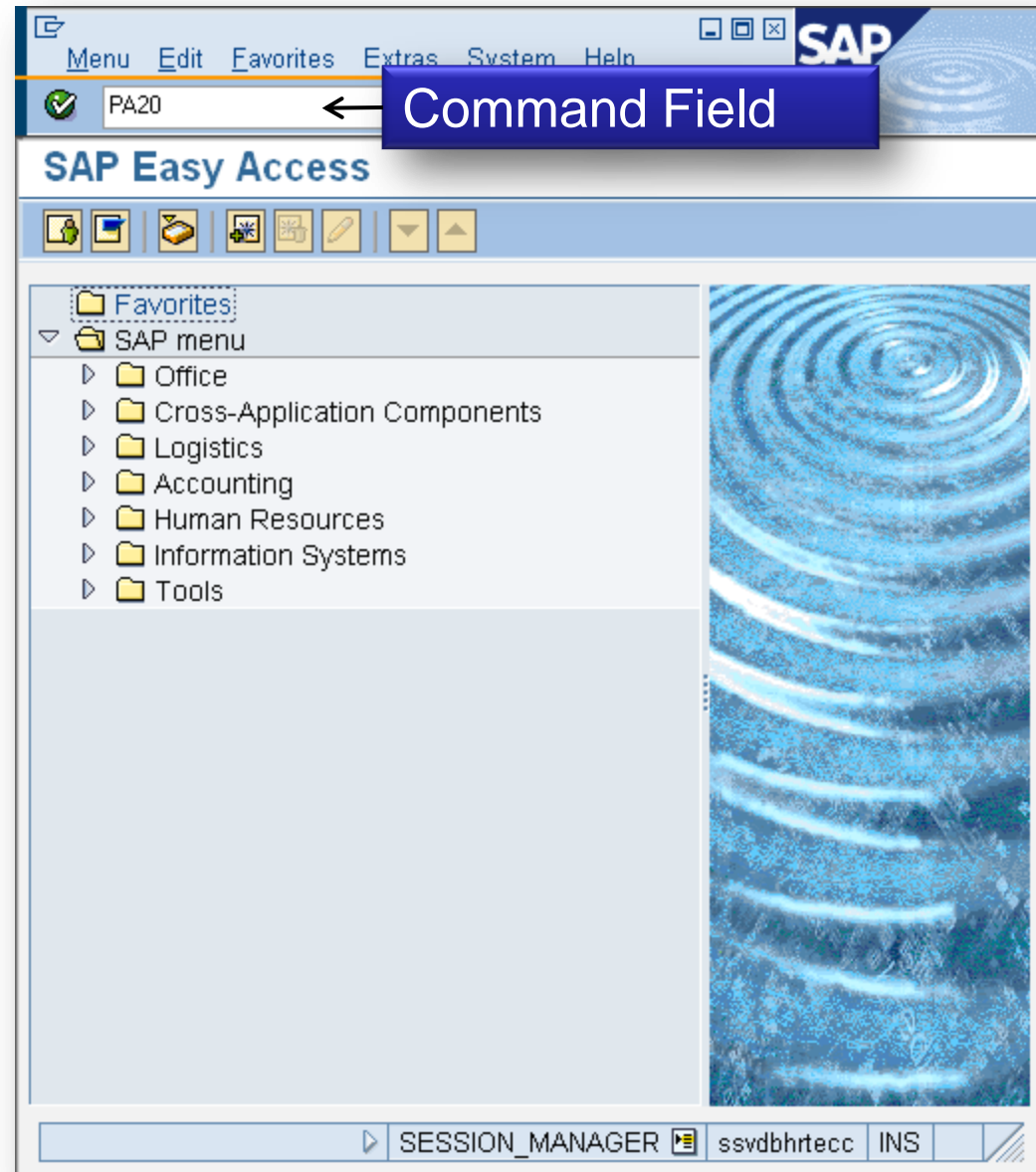
# Command Field Navigation

The Command field is located on the Standard Toolbar. Use the Command field to access transactions directly using transaction codes.

Each HRMS transaction is assigned a transaction code. These codes provide you access to a transaction's initial screen.

Type PA20 (Display HR Master Data) in the command field to access employee data.

Click  (**Enter**)





# Command Field Navigation (con't)

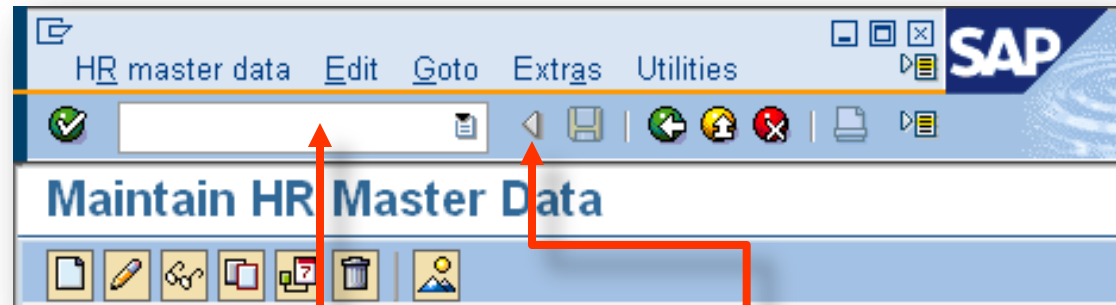
The Command field has a toggle feature which can hide or unhide the field.



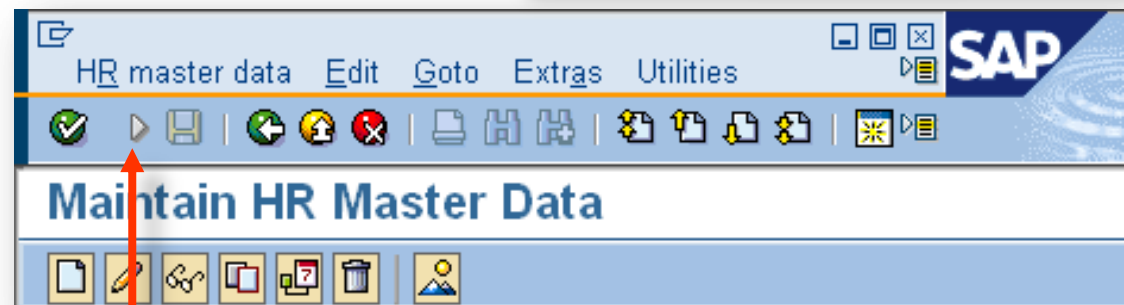
To hide the Command field, click the small white arrow just outside of the Command field box.



Do the same to unhide the Command field.



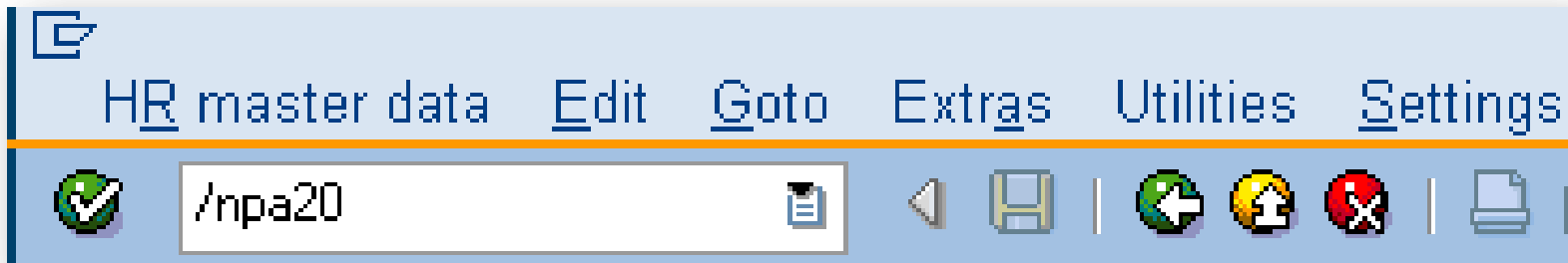
The **arrow** will point left when the **command field** is displayed.




The **arrow** will point right when the **command field** is hidden.

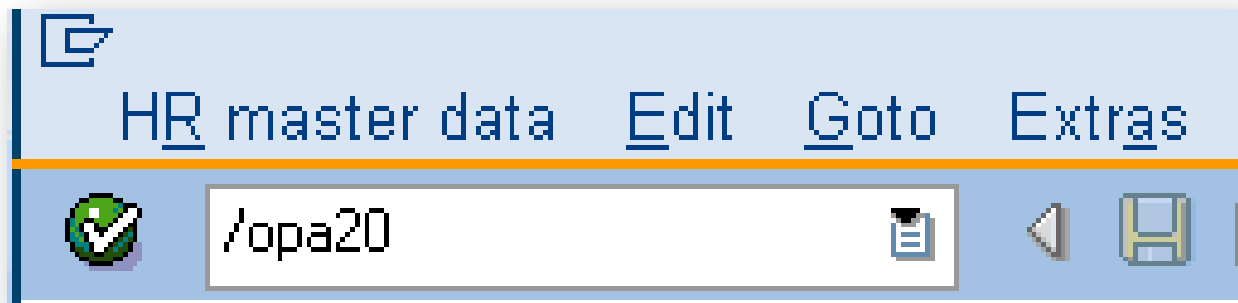
# Command Field Navigation (con't)

- To navigate to another transaction from the transaction you are currently in, type **/n** followed by the desired transaction code in the Command field.
- **/n** closes the transaction you are currently in and opens another one.
  - **Caution** - save changed data prior to going to a another transaction when using this function as any unsaved data will be lost.
  - If you access another transaction using “**/n**” you cannot return to your original transaction by using the **Back** button. Using the **Back** button, will return you to the *SAP Easy Access* screen and unsaved data is lost.



# Command Field Navigation (con't)

- To keep a transaction open that you are working in, and open another session click the **New Session** button . This opens another session without ending the current transaction you are working in.
- You can also open a new session by typing **/o** followed by the transaction code in the Command field.
- You can toggle between opened transactions to view data. You can have up to six (6) transactions open at once.



# HRMS Activity



**Navigating using the HRMS Menu  
Activity - Page 5**

# Personnel Numbers

# Personnel Number




Once you enter a transaction code you need to enter a personnel number for an employee.

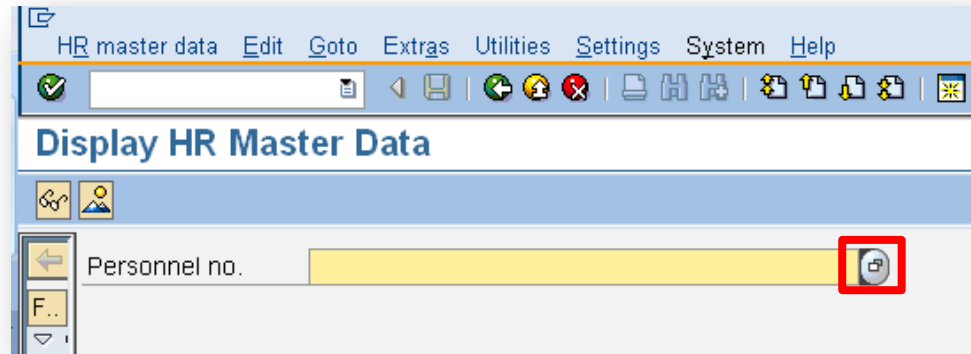
## The personnel number:

- ✓ is automatically assigned to an employee.
- ✓ allows for employees to have a unique identifier other than the social security number.
- ✓ is generated during the new hire process.
  - ✓ unless an employee is returning to state employment.
- ✓ is sometimes referred to as a “prnr”.
- ✓ is never repeated.

# Personnel Number Search


Use transaction code **PA20**

- 1) Click on the  (**Matchcode**)
- 2) Click the  (Last name – First name) tab
- 3) Enter the employee's last name (and first name to narrow the search results)
- 4) Click  (**Start Search**)

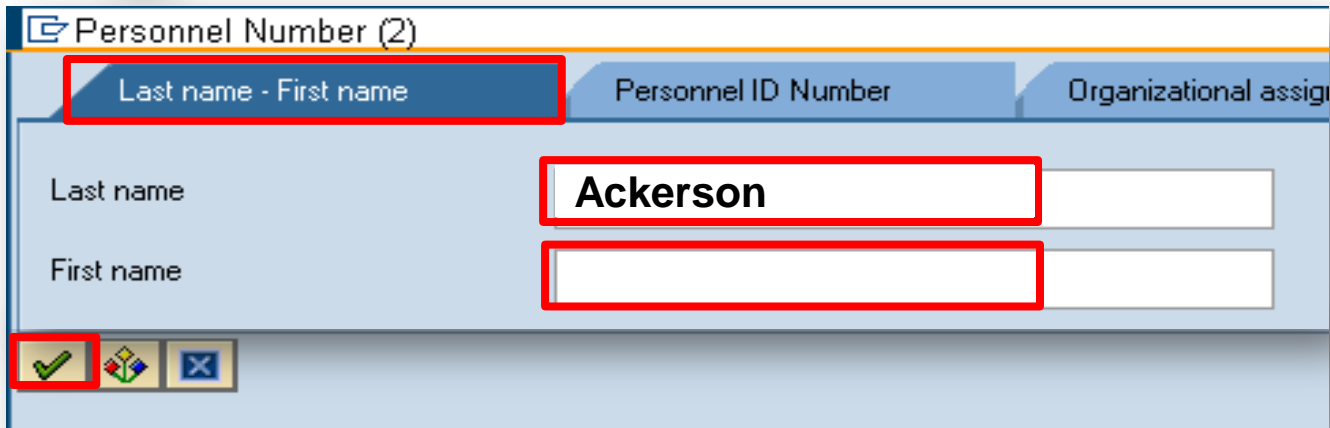


HR master data Edit Goto Extras Utilities Settings System Help

Display HR Master Data

Personnel no. 

**Note:** You can search by Social Security Numbers (SSN) by selecting the '**Personnel ID Number**' tab. Enter the SSN in the ID field.






Personnel Number (2)

Last name - First name Personnel ID Number Organizational assign

Last name Ackerson

First name

# Personnel Number Search (con't)

5) The results will display, click on the appropriate employee name (select the record of choice)

6) Click  (**Copy**) to accept

Personnel Number (1) 1 Entry found

Last name - First name	Personnel ID Number	Organization
ACKERSON SUE	40000186	


Last name	First na...	Ti...	Birth date	Pers.No.	Start Date	End Date
ACKERSON	SUE		11/19/1960	40000186	11/19/1960	12/31/9999

Personnel no. 40000186

Name ACKERSON SUE

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00HA WFSE Agencywide EESubgroup 05 H-OT Elig>40hrs/wk Status Active

7) Click  (**Enter**) to populate the employee's information into the screen


**Note:** The Personnel no. pop-up box may list several names. If you are searching for a common name such as, John, HRMS will return a long list of names. To identify the correct John, use the employee's birth date in the Start Date column to identify the correct record.

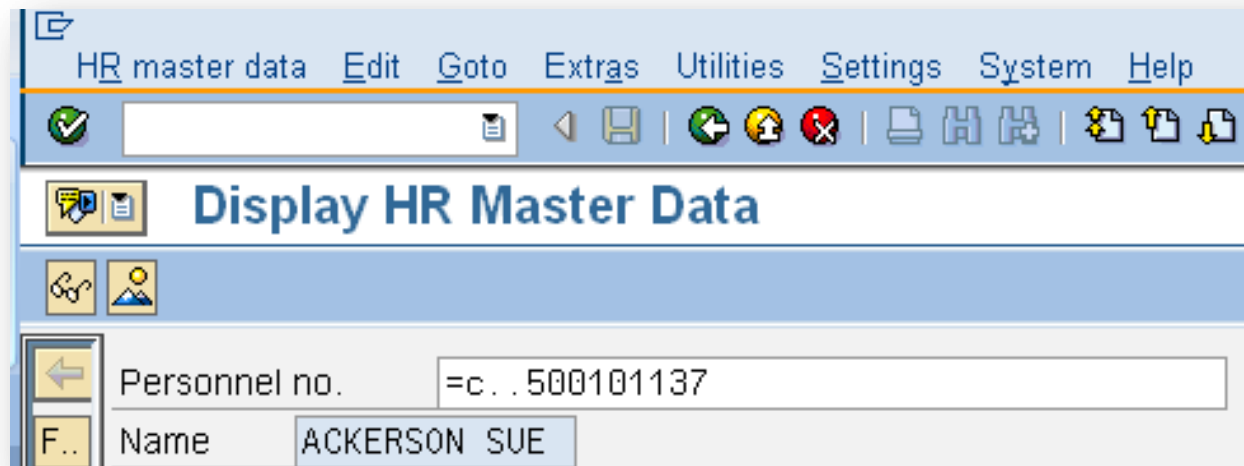


# Alternate Search Methods

Use this search method if the Social Security is all that is known. Or in the case of a common name that will return multiple results. (ex: Johnson)

## Social Security Number

- In the Personnel no. field type **=c..** followed by the Social Security number (no dashes)
- For example type **=c..500101137** and click  (**Display**) to view the employee's record.



The screenshot shows a web application interface for displaying HR Master Data. At the top is a menu bar with links: HR master data, Edit, Goto, Extras, Utilities, Settings, System, and Help. Below the menu is a toolbar with various icons for navigation and actions. The main heading is "Display HR Master Data". Below this, there are two search fields. The first field is labeled "Personnel no." and contains the text "=c..500101137". The second field is labeled "Name" and contains the text "ACKERSON SUE". To the left of the "Personnel no." field is a button with a left-pointing arrow. To the left of the "Name" field is a button labeled "F..".

# Alternate Search Methods (con't)


## Search by First Name

In the Personnel no. field type =.. followed by the first name of the employee.

Example: The employee's first name is George. Type **=..George** and click  (**Display**). A list of all employees with the first name "George" will display.

## Search by Last Name

In the Personnel no. field type = followed by the last name of the employee.

Example: The employee's last name is Ackerson. Type **=Smith** and click  (**Display**). A list of all employee with the last name "Smith" will display.

# Alternate Search Methods (con't)

## Use an asterisk \* as a Wildcard

If you know the first letter of the last name (or first name) but are unsure of the correct spelling, type in the first letter or two followed by an asterisk (\*). A list of names starting with these letters will be displayed.

## Search by the middle part of a name

The wildcard (\*) can be used in many different ways. At the beginning of a name, at the end of the name, in the middle of the name.

Examples:    \*ale = Dale, Gale, etc.  
                  \*u\* = Sue, Julie, Justin, Nguyen  
                  pete\* = Peterson, Petes, Petersburg

# HRMS Activity



**Searching for Personnel Numbers  
Activity - Page 6**

# Accessing Infotypes

# Navigating Infotypes

An infotype is a screen within a transaction in which employee information is ***displayed*** or ***maintained***.

Infotypes are organized under tabs. For example; the **Addresses** infotype falls under the **Basic Personal Data** tab.

Infotype text	Exists
Actions	✓
Organizational Assignment	✓
Personal Data	✓
Addresses	✓
Planned Working Time	✓
Basic Pay	✓
Contract Elements	✓
Date Specifications	✓
Family/Related Person	

Period

☒ Period


From  To

☐ Today ☐ Curr.week

☐ All ☐ Current month

☐ From curr.date ☐ Last week

## Tip:

Use the Scroll arrows  to navigate through the all the tabs.

Use the scroll arrows to navigate the list of infotypes. 

# Accessing Infotypes (con't)

To access an infotype after you have entered the personnel number, choose one of these methods:

Method # 1 - Click the gray box *left of* the desired infotype text

Method # 2 - Use Direct selection by typing in the specific infotype name or number

The screenshot shows the SAP HR Infotype selection screen. The 'Basic Personal Data' tab is selected. The list of infotypes is as follows:

Infotype text	Exists
Actions	✓
Organizational Assignment	✓
Personal Data	✓
Addresses	✓
Planned Working Time	✓
Basic Pay	✓
Contract Elements	✓
Date Specifications	✓
Family/Related Person	

The 'Direct selection' section at the bottom is highlighted with a red box. It contains the following fields:


Infotype:  STy:

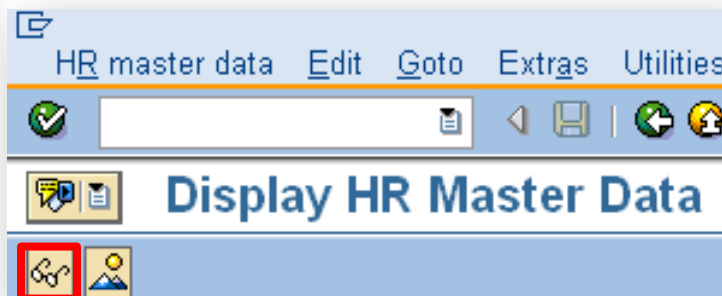
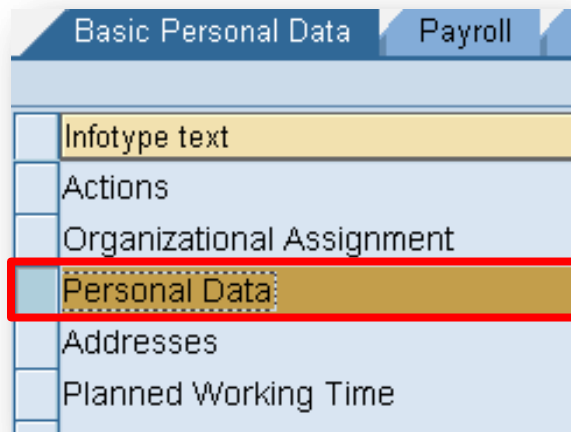
Infotypes with a green checkmark next to them indicate (generally) that information has been stored. (The Time Recording tab is an exception.)




# Accessing Infotypes (con't)

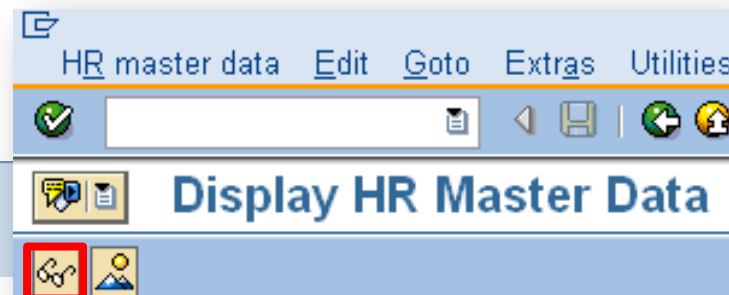
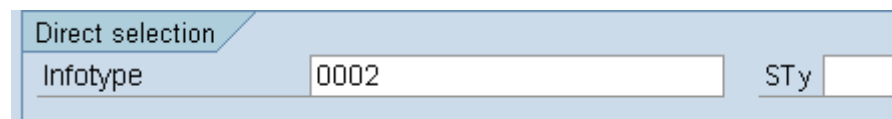
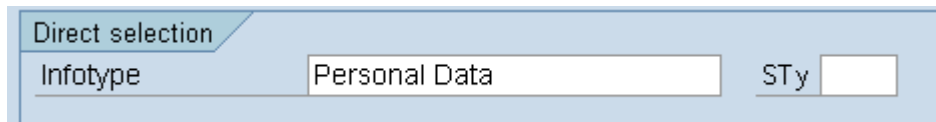
## Method # 1

Click on the gray box to the left of the infotype text and then select the  (**Display**) icon to open the Personal Data infotype for that employee.



## Method # 2

Type the infotype number or name in the direction selection area and then select the  (**Display**) icon to open the Personal Data infotype for that employee.



# HRMS Activity



**Navigating with Infotypes  
Activity - Page 7**

# Section Review

**1. What are the two ways you can begin a transaction?**

---

---

**2. Before you can access an infotype, you must search and enter this?**

---

---

**3. What are two ways to select an infotype?**

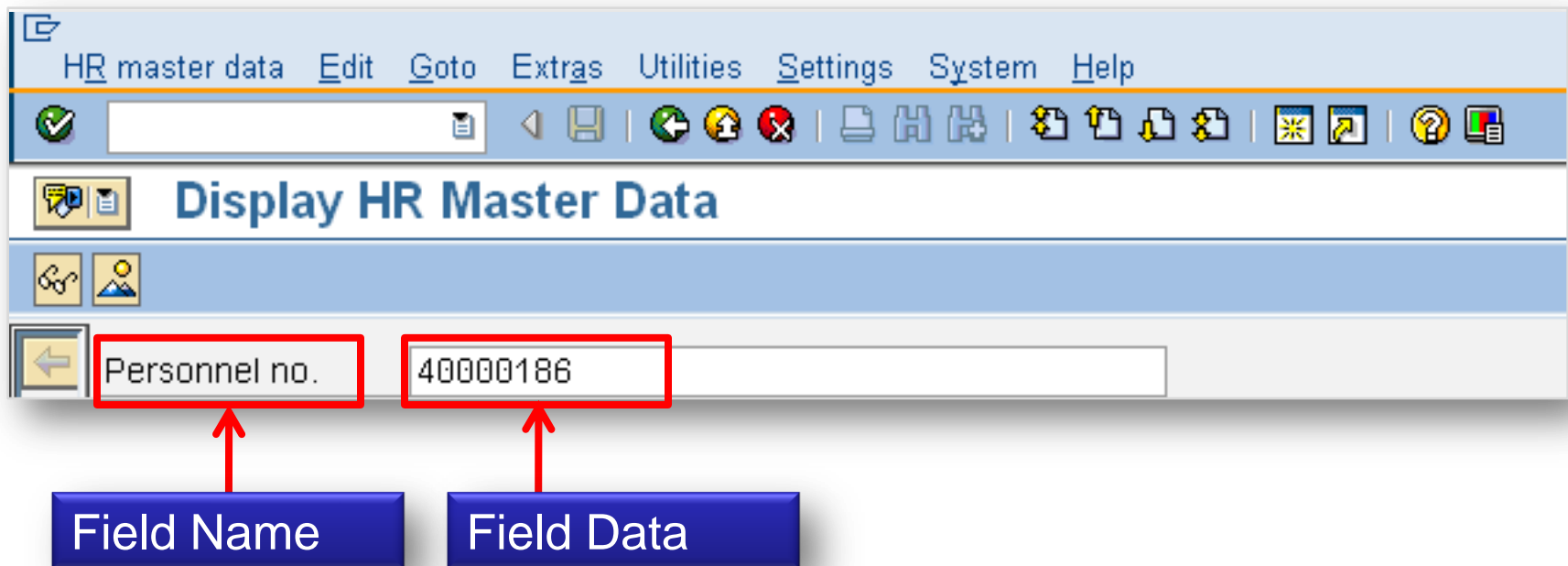
---

---

# Types of HRMS Fields

# Types of HRMS Fields

A field is composed of a field name and field data. The ***field name*** describes the field, while the ***field data*** provides specific information that you either view or enter data.



# Types of HRMS Fields

1. **Active field** is the field your cursor is currently in. It changes as you move from field to field. An Active field is highlighted yellow.
2. **Default fields** contain data automatically. You may overwrite the data.
3. **Display Only** fields provide information and cannot be changed. Display fields are grayed out.
4. **Required fields** must be populated with valid data before moving on to the next screen.
5. **Optional fields** are not necessary to complete or to continue to the next screen. Your agency may require you to complete some optional fields.

The screenshot shows the 'Create Actions (0000)' form in the HRMS system. The form is divided into several sections: 'Personnel action', 'Status', and 'Organizational assignment'. Annotations with red arrows point to specific fields to illustrate the five types of HRMS fields:

- Active:** The 'Change info group' button is highlighted yellow, indicating it is the active field.
- Default:** The 'Start' date field is pre-filled with '12/31/9999', indicating it is a default field.
- Display Only:** The 'Action Type' field is pre-filled with 'New Hire' and is grayed out, indicating it is a display-only field.
- Required:** The 'Position' field has a checkmark in the adjacent box, indicating it is a required field.
- Optional:** The 'Employee subgroup' field is empty, indicating it is an optional field.

# Review

## 1. Circle the two fields not in HRMS.

- a. Default field
- b. Add field
- c. Optional field
- d. Required field
- e. Active field
- f. Calculator field
- g. Display Only field

## 2. What does this symbol represent?



---



# Customize HRMS

# HRMS Customization


HRMS can be customized to fit the user's business needs.

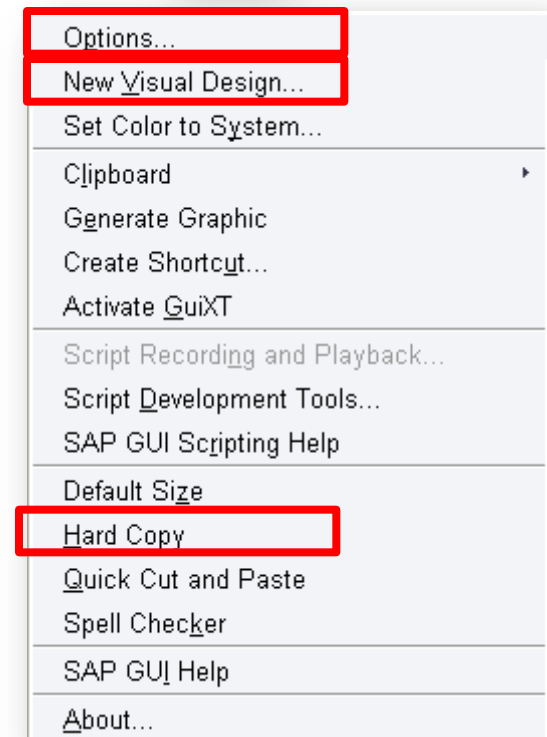
The **Local Layout** button  is located on the Standard Toolbar.

- Customize your screen layout by customizing the appearance of HRMS. (agency policy dictates)
- Print a screenshot of what is currently displayed.
- Change how system messages are displayed.
- Activate the 'Quick Cut and Paste' option.



# Local Layout Menu Options

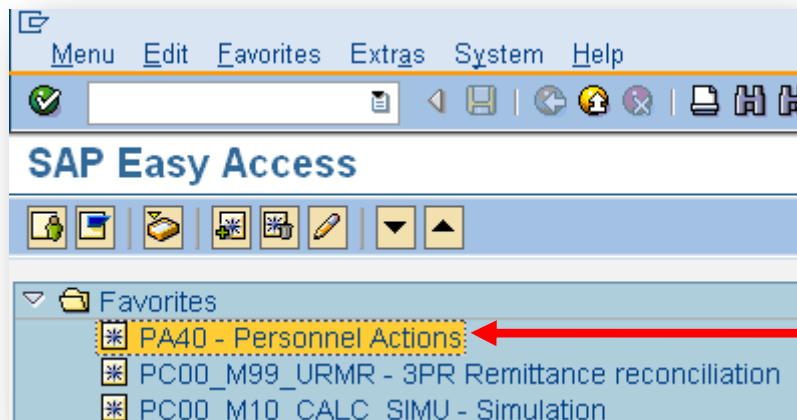
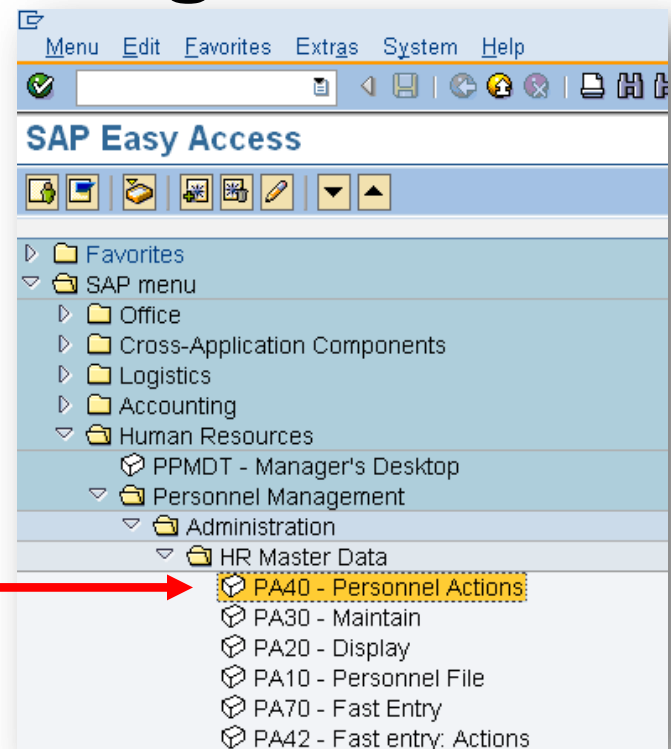
1. Selecting **New Visual Design** customizes the appearance of HRMS:
  - Color scheme
  - Font Size
  - Sound
2. Selecting **Options** changes the display of system messages:
  - Select the *Options* tab (Scroll to the left using the  (scroll bar))
  - In the Messages area, choose as desired
  - Click **OK**
3. Select **Hardcopy** to make a screen print




# Favorites Menu – Click & Drag

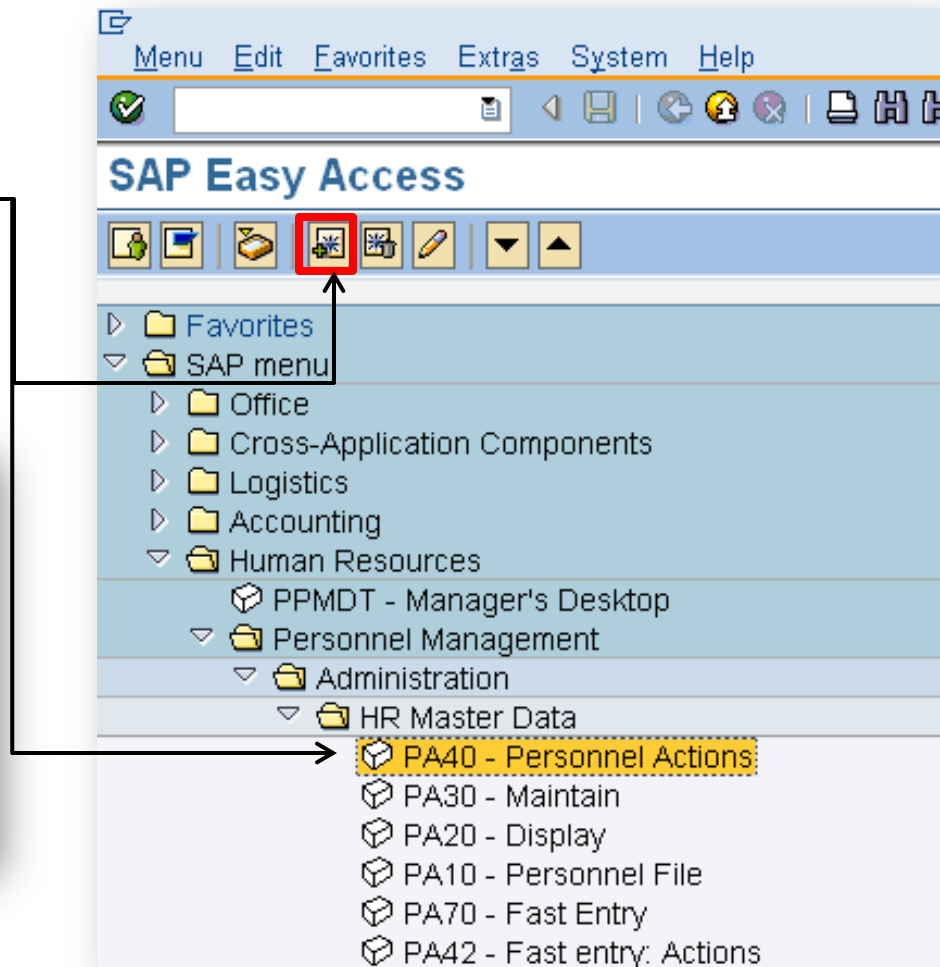
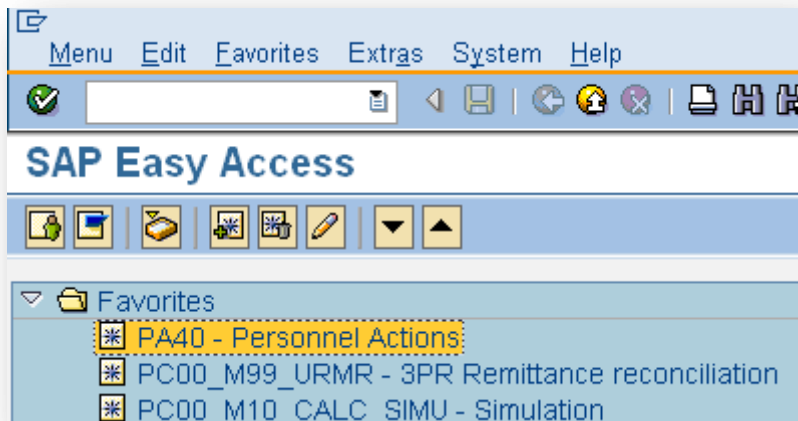
- 1) Select the desired transaction or infotype you want to add
- 2) Click and drag the selection to the *Favorites* folder

Note: When using the click and drag method, the menu path will not display in the Favorites – only the transaction code and name.




# Favorites Menu – Add to Favorites

- 1) Select the desired transaction or infotype you want to add
- 2) Click on the  (**Add to Favorites**) button




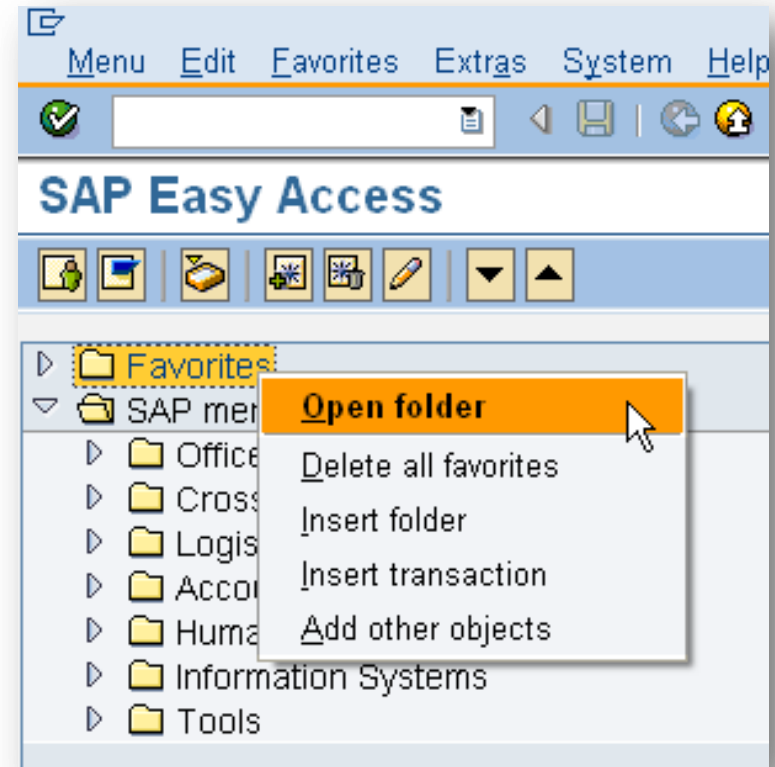
# Favorites Menu – Organize

## To add Sub-folders:

- Right-click on the Favorites folder and select Insert folder.
- Create a folder name and click  **(Continue (Enter))**.

## To add Transaction codes:

- Right-click on the Favorites folder and select Insert transaction.
- Enter the transaction code and click  **(Continue (Enter))**.



# Review

1. Which button is used to add a transaction to your Favorites menu?

a.



b.



c.



2. What does the Local Layout  button do?

---



# **On-line Quick Reference (OLQR)**

# On-line Quick Reference (OLQR)

The OLQR is made up of these areas:

- Functional Areas and Roles
- Job Aids
- HRMS Reports
- User Procedures
- Course Manuals
- Glossary



Web address:

<http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/default.aspx>

# Locating User Procedures

- View the list of procedures by choosing a letter of the alphabet (horizontal dotted **green** line) or scroll down the list of procedure names (vertical solid **brown** line)

Washington State Department of Personnel

Home Strategic HR Compensation & Job Classes Training Recruitment Rules Diversity Payroll More DOP Services

Home > Payroll > Human Resource Management System > On-Line Quick Reference > [Print Friendly](#)

**User Procedures**

The User Procedure page contains instructional materials that describe how end users should perform basic tasks in the Human Resource Management System (HRMS).

These User Procedures define the steps performed under normal user scenarios and under system error scenarios.

Below is the User Procedures A-Z. Click a letter to view a topic and navigate the page to get to the appropriate procedure.

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

User Procedures (Word)	Transaction Code (pdf)	Date
<a href="#">Addresses</a>	<a href="#">PA30</a>	07/17/06
<a href="#">Addresses - Display Only Information</a>	<a href="#">PA20</a>	11/01/05
<a href="#">Appointment Change Action - Transfer</a>	<a href="#">PA40</a>	08/21/06
<a href="#">Appointment Change Action After In-Training</a>	<a href="#">PA40</a>	04/20/06

# Accessing the User Procedures

- To view a selected procedure, choose a format by choosing a column:

**User Procedures** allows you to ***open*** and/or ***save***★ the procedure (modify)

or

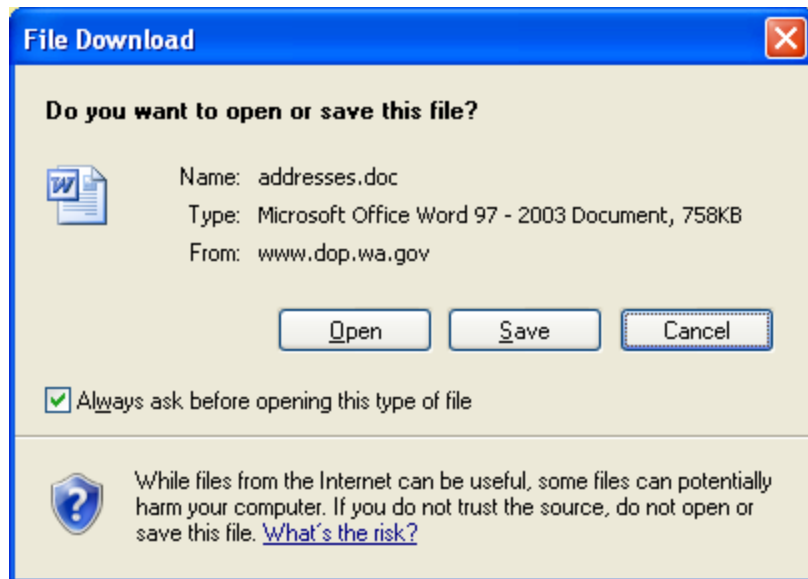
The **Transaction Code** column opens the document in **.pdf** format (cannot modify) in your internet browser window

★ Currently saving documents is experiencing problems

User Procedures (Word)	Transaction Code (pdf)	Date
A		
<a href="#">Addresses</a>	<a href="#">PA30</a>	07/17/06
<a href="#">Addresses - Display Only Information</a>	<a href="#">PA20</a>	11/01/05
<a href="#">Appointment Change Action - Transfer</a>	<a href="#">PA40</a>	08/21/06
<a href="#">Appointment Change Action After In-Training</a>	<a href="#">PA40</a>	04/20/06

# Saving User Procedures

- Click on the link to open the User Procedure.
- Once the document is displayed select the File Save As open in Microsoft Word, select a location and save the document.



Title: Addresses, Create and Maintain  
Processes :  
Sub-Processes :

---

HRMS Implementation Training Documents

**Addresses, Create and Maintain** PA30

**Change History**

Update the following table as necessary when this document is changed:

Date	Name	Change Description
5/30/06	Chyllynn Hansel	New Procedure
7/17/06	Chyllynn Hansel	Edits

# Printing OLQR Documents

- Once the procedure has been opened, **right-click** anywhere within the procedure

- Scroll down the list and select **Print**

- Verify the print options, click **Print**

Or

Use the standard Microsoft Word menu to print as you normally would.

Title: Addresses\_Create and Maintain  
Processes :  
Sub-Processes :  
HRMS Training Documents

---

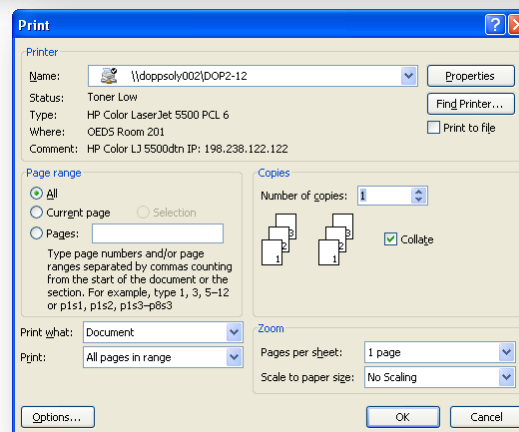
Addresses\_Create and Maintain PA30

**Change History**

Update the following table as necessary when this document is changed:

Date	Name	Change Description
5/30/06	Chyllynn Hansel	New Procedure
7/17/06	Chyllynn Hansel	Edits

- ☒ Select Tool
- ☐ Hand Tool
- ☐ Marquee Zoom
- ☐ Rotate Clockwise
- ☒ Print... Ctrl+P
- ☐ Search Shift+Ctrl+F
- ☐ Document Properties... Ctrl+D
- ☐ Page Display Preferences...



# HRMS Activity



**Accessing the On-line Quick Reference  
Find It! - Page 8**

# System Messages



# HRMS System Messages

- Error messages\*
- Warning messages\*
- Information messages\*
- System Abend messages\*
- ZAlert messages
- HRMS Support

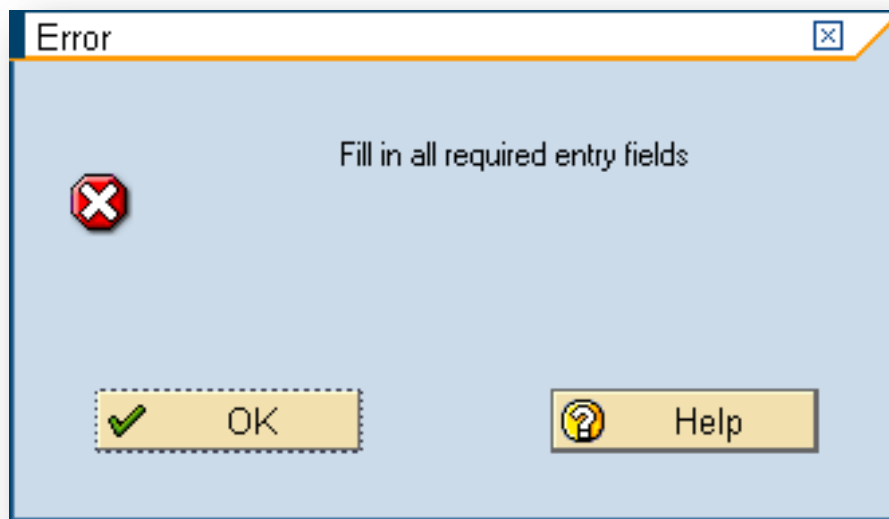


\*These are shown on the HRMS Basics Job Aid.

# Error Messages

Error messages indicate a required entry has not been made.

- If an error message appears, HRMS does not allow you to continue until you correct the error.
- System messages are indicated with an icon that identifies the type of message.
- The error message is indicated by a red stop sign. A red circle with an “X” appears on the status bar.



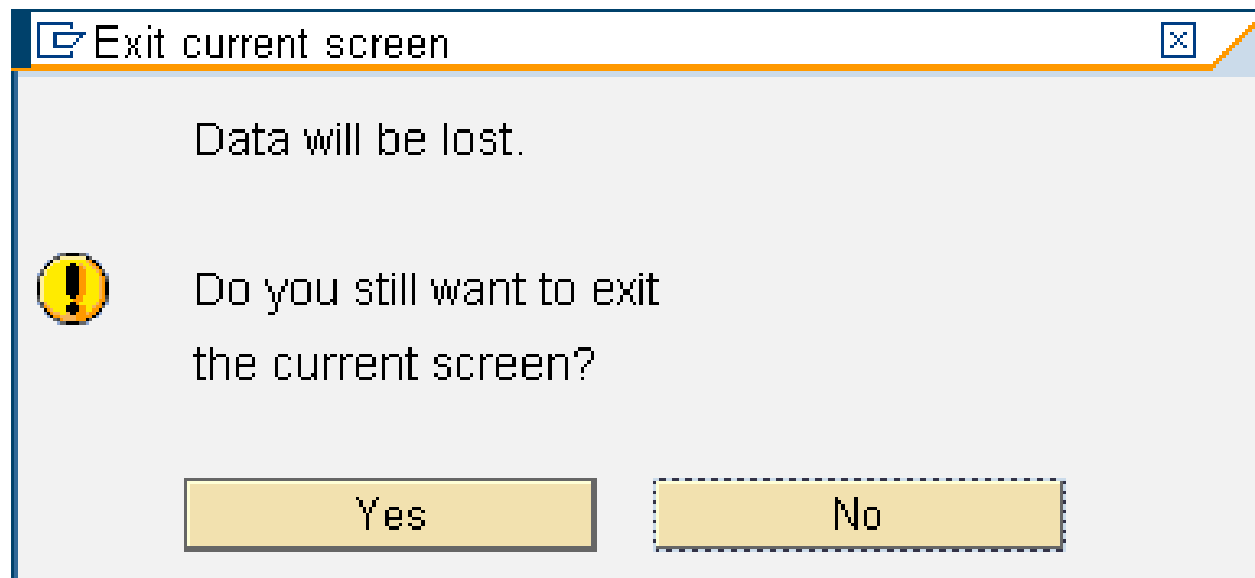
**Note:** To resolve an error message you need to verify that all required fields are entered.

If not, you need to complete these fields to move forward.

# Warning Messages

You receive a warning message when HRMS detects a possible error.

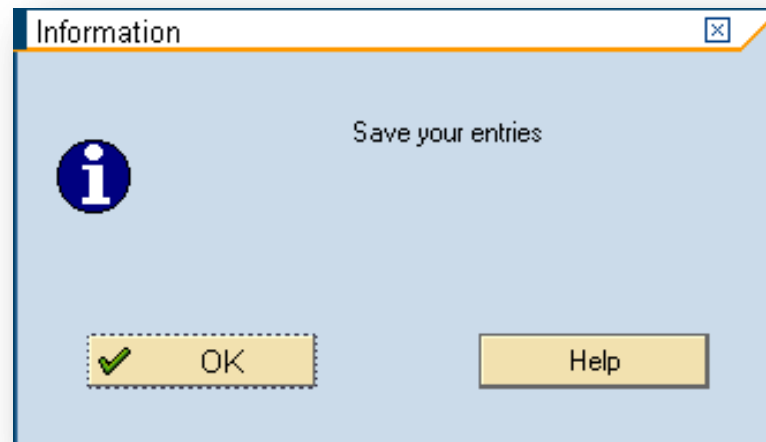
- Verify that everything has been entered correctly, press **Enter** and continue with your work.
- The warning message is indicated by a yellow circle with an exclamation point that appears in a pop-up box and on the status bar.



# Information Messages

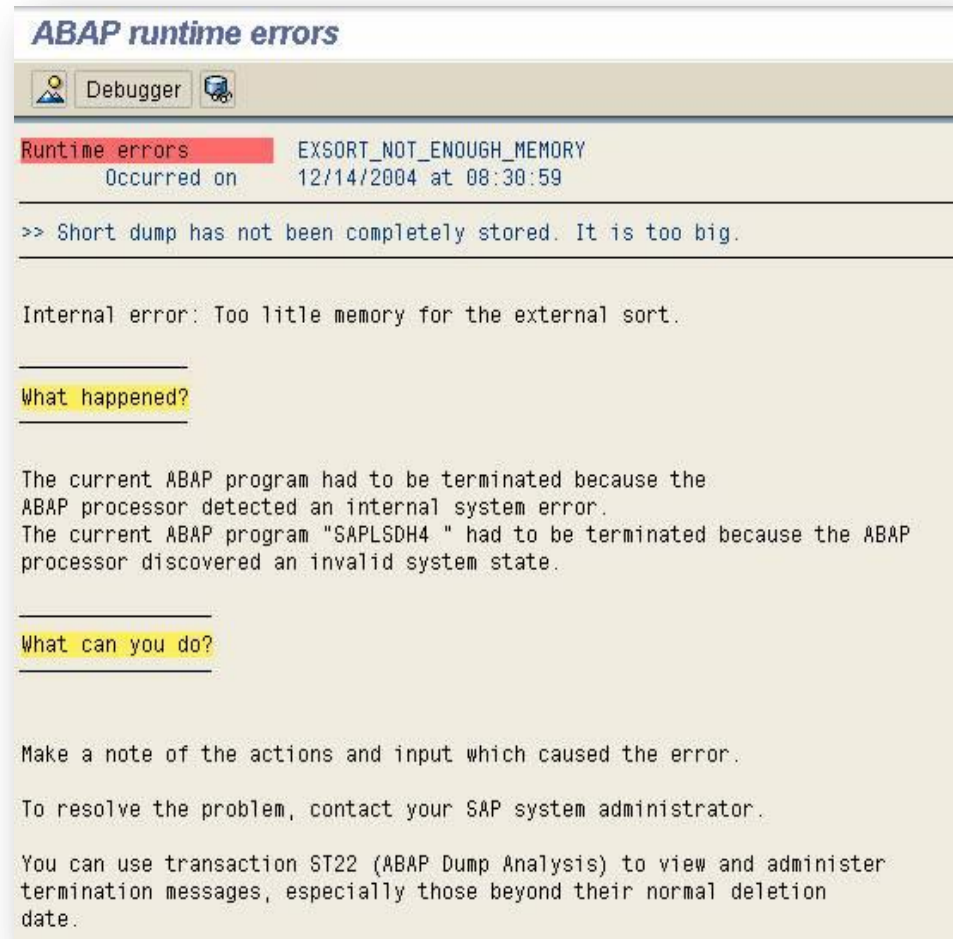
Once you complete a process, HRMS displays an information message verifying the task is complete.

- Information messages are meant to inform and do not require any further action other than to acknowledge the message prior to saving.
- The information message is indicated by a blue circle with a white “i” in a pop-up box and by the **Enter** button in the status bar.



# System Abend Messages

- System abend messages indicate a problem with hardware or HRMS.
- The message can be found in the status bar which is located at the bottom of the HRMS screen.
- These problems are generally out of your control to correct. In this case contact your agency Helpdesk/agency system administrator or ISD Helpdesk.



**Note:** Follow **your Agency's protocol** when dealing with system and hardware messages/errors. For example: Make a screen print of the message, report problem to help desk, etc. If you receive a System Abend message ***stop working and contact your system administrator.***

# ZAlert System Messages

- Messages are sent by the Service Center unit and will appear when logged into the system or when first logging in.
- Messages will vary and may contain information regarding payroll pick-up or may direct you to the HRMS Message Center.

Note: ZAlerts will last up to 2 hours after being displayed. Once the message has expired you will no longer see the message.

## Attention

An important notice was added to the message screen.

To access, enter /oPA20 in the command field.

From the menu bar, click Help and select HRMS Help

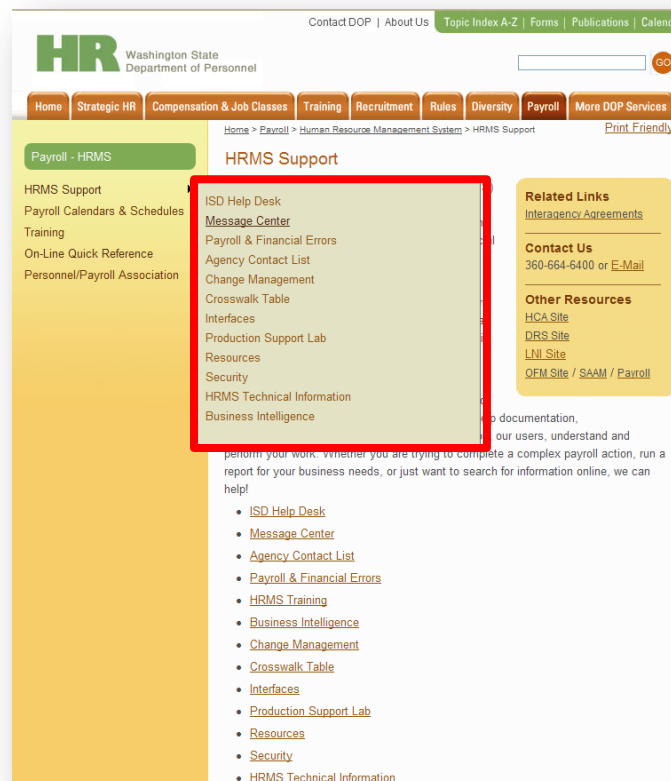
In the pop-up security alert box, click OK

From the OLQR tool bar, click the messages button

# HRMS Support – Message Center

- When an issue or update needs to be communicated to HRMS users, HRMS Support transmits a ZAlert that instructs user to access the HRMS message center for an update.
- Messages can be accessed through the HRMS Support website:

<http://www.dop.wa.gov/payroll/HRMS/HRMSSupport/Pages/MessageCenter.aspx>



# Review

1. Match the picture with the correct HRMS system message.

1. Error Message

a.



2. Warning Message

b.



3. Information Message

c.



2. What does a system abend message indicate and what should you do if you receive one?

---


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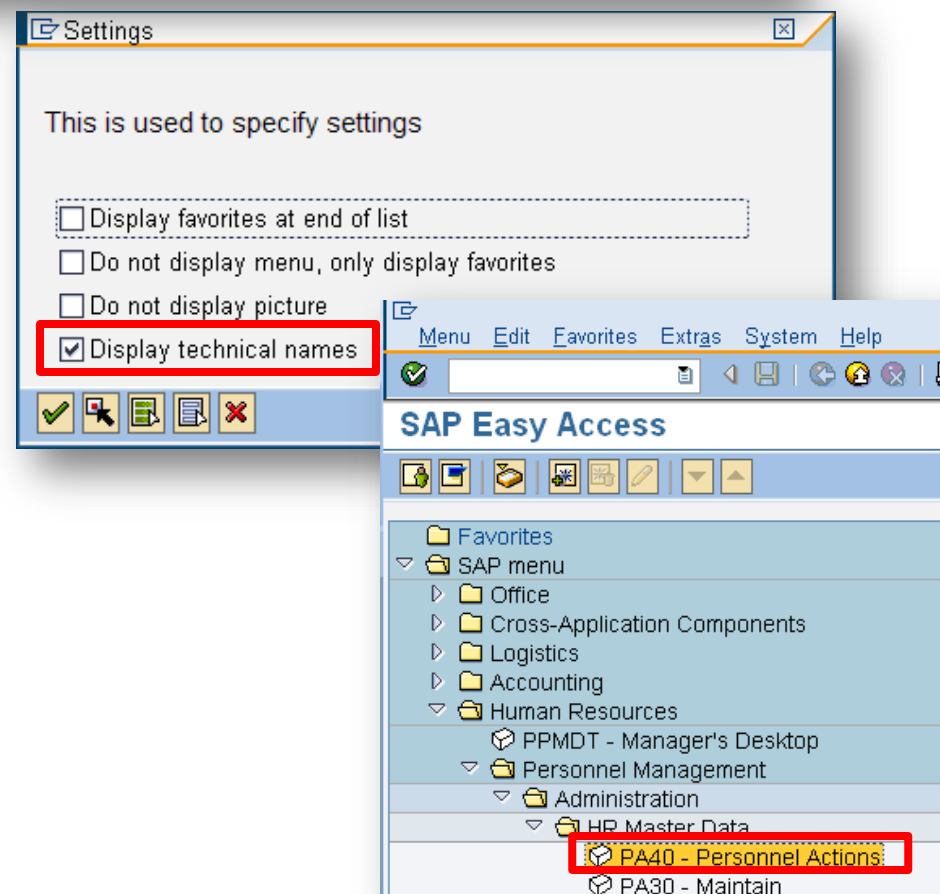
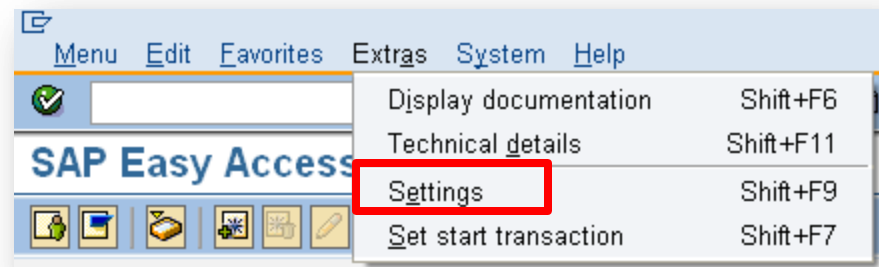
---




# Helpful Hints

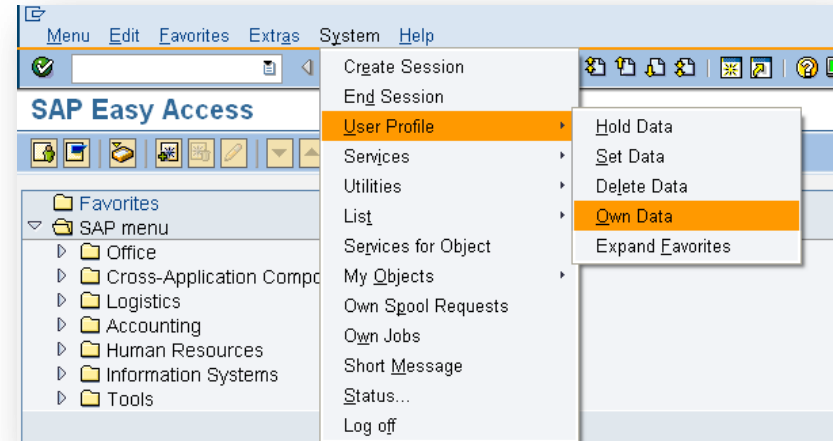
# #1 Display transaction codes in HRMS menu

1. On the *SAP Easy Access* screen, from the Menu bar, select **Extras** then **Settings**
2. A pop-up box will appear, click the **Display technical names** checkbox
3. Click the  (**Enter**) button in bottom left corner of screen



# # 2 Displaying Infotype Number

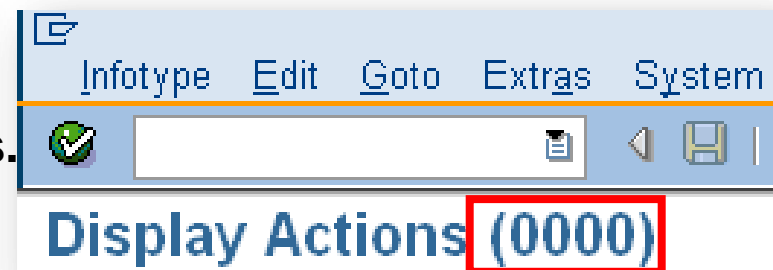
1. From the *Menu bar* select **Systems → User Profile → Own Data**
2. Select the *Parameters tab* and from the *Parameter ID column* locate or input the entry: **HR\_DISP\_INFITY\_NUM**
3. In the *Parameter Value column* enter an X
4. Click  (**Save**) to Save



Parameter ID	Parameter value	Short Description
/RWD/LANG	EN	RWD Context Sensitive Help User Reference Language
/RWD/ZCH	HELP SERVER	RWD Context Sensitive Help PID
HR_DISP_INFITY_NUM	x	HR: Display Infotype Number
MOL	10	Personnel Country Grouping
OM_OBJM_NO_LAST_SEAR	X	OM: Do Not Restore Last Object Manager Search



Without Infotype Number



With Infotype Number

# # 3 Maintain Text in Infotypes

Allows you to create informational notes on infotypes.

The text can be edited and deleted by any user who has create/change access to the infotype.

You can only have one message on an infotype, however you may add several comments to that message.



Not all infotypes allow text to be entered.

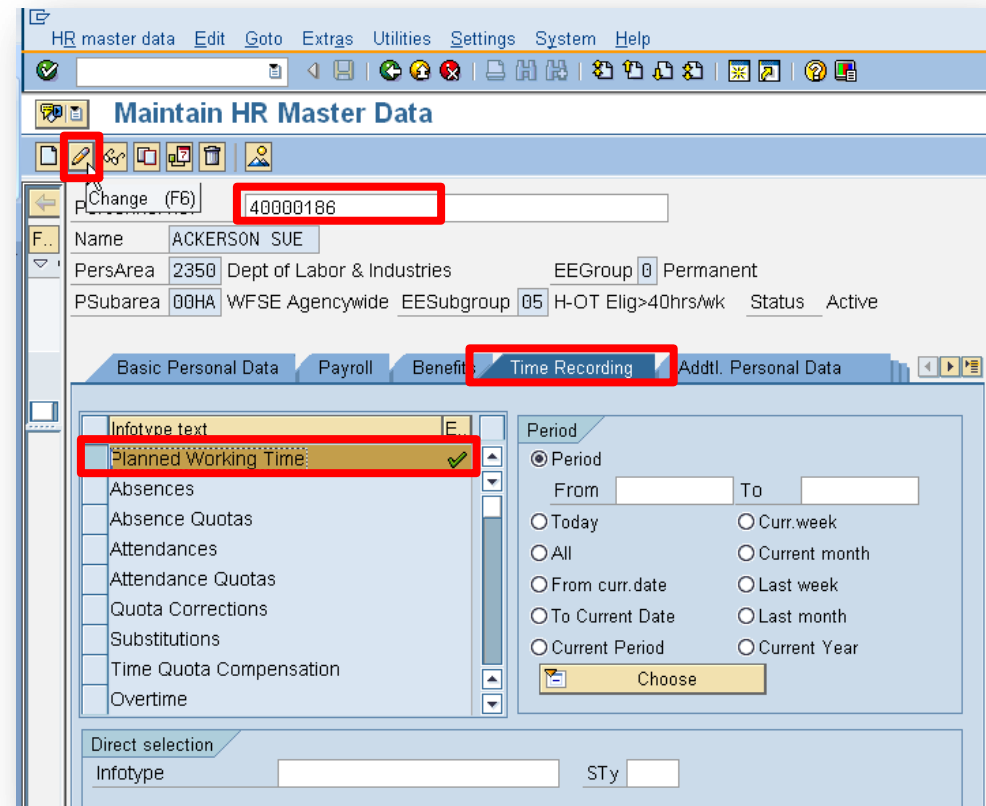
Below is a partial list of infotypes that allow text:

▪ Org Assignment (0001)	▪ Planned Working Time (0007)
▪ Basic Pay (0008)	▪ Contract Elements (0016)
▪ Recurring Payments & Deductions (0014)	▪ Additional Payments (0015)
▪ Withholding Info (0210)	▪ Additional Info (0234)
▪ Health Plans (0167)	▪ Savings Plans (0169)
▪ Miscellaneous Plans (0377)	▪ General Benefits (0171)
▪ Date Specifications (0041)	

# # 3 Maintain Text in Infotypes (con't)


91

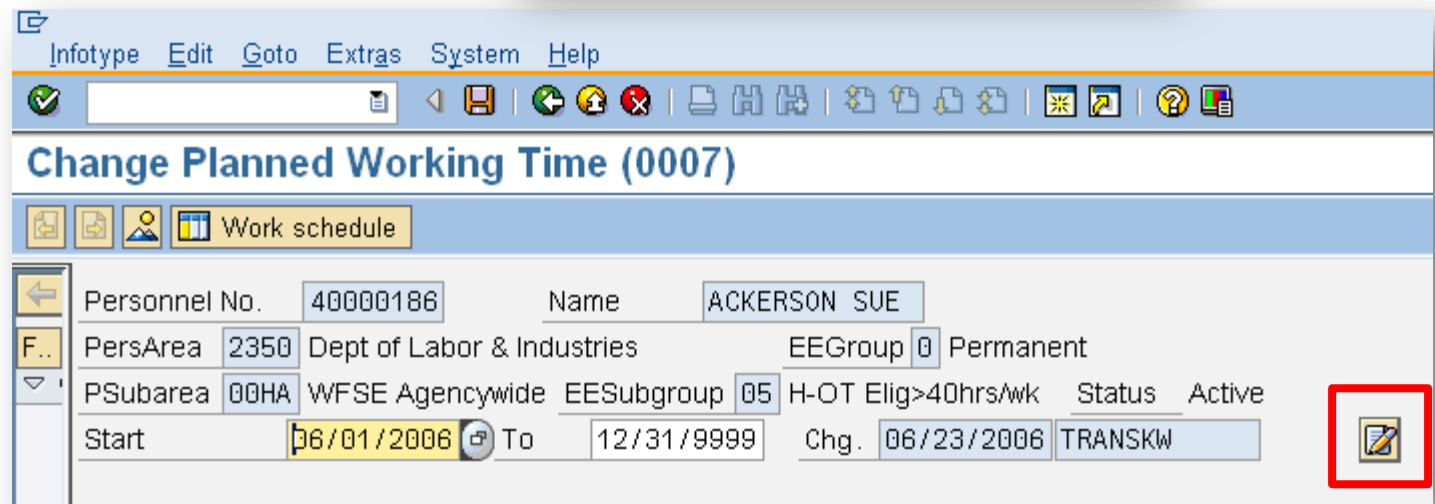
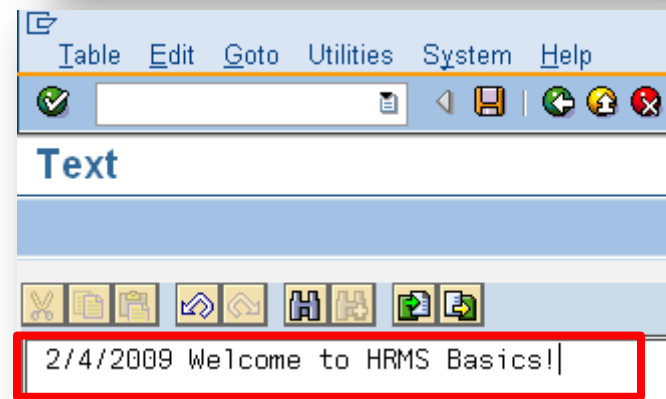
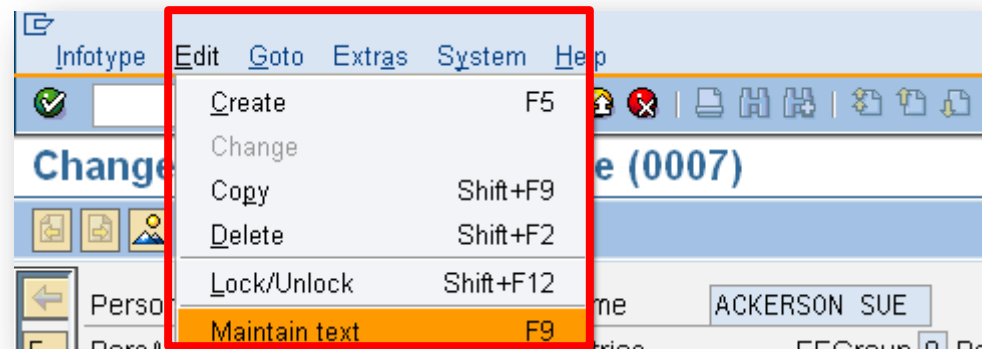
1. Enter the Transaction Code **PA30** in the command field
2. Click  (**Enter**)
3. Enter the employee's *Personnel no.*
4. Select **Planned Working Time** (0007) on the **Time Recording** tab
5. Click  (**Change**) to change the record



# # 3 Maintain Text in Infotypes (con't)

92

6. From the **Menu bar**, click **Edit** and then **Maintain text**
7. Enter noteworthy text
8. Click  (**Save**) to save your entry
9. Once saved, the **(maintain text)** icon will be placed on the infotype



# HRMS Activity



**Maintain Text in Infotypes -  
Page 9**

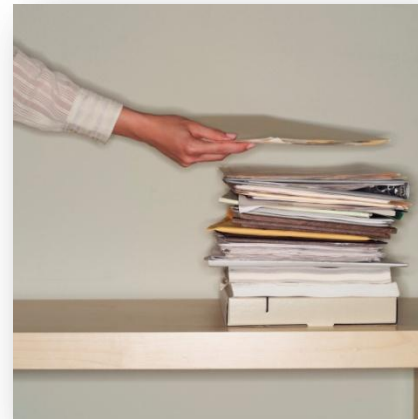
# Reports



# Reports in HRMS

HRMS reports are available across functional areas to allow you to:

- Access reports and data that relate to business tasks performed within your role.
- Process information quickly to support decision making.
- Take a snapshot of data for your agency or sub-agency.
- Data displayed in reports are filtered to be unique to each agency or sub-agency.



# Reports in HRMS

There are three basic types of reports:

## **Standard reports** (begin with an **S**)

- Included with the SAP software and meet Washington State's general business needs. (Standard reports are also referred to as "SAP Standard" reports in HRMS materials.)

## **Customized reports** (begin with **ZHR**)

- Created by the HRMS Project Team specifically for Washington State's business needs.

## **Business Warehouse (BW) reports**

- Provides end users the ability to develop ad-hoc queries.
- BW reports will be discussed in the "Business Warehouse" course. (Visit the following website for more information:  
<http://www.dop.wa.gov/HRMS/CustomerSupport/BusinessWarehouse/Default.htm> )

# Reports in HRMS


## Key Features and Benefits:

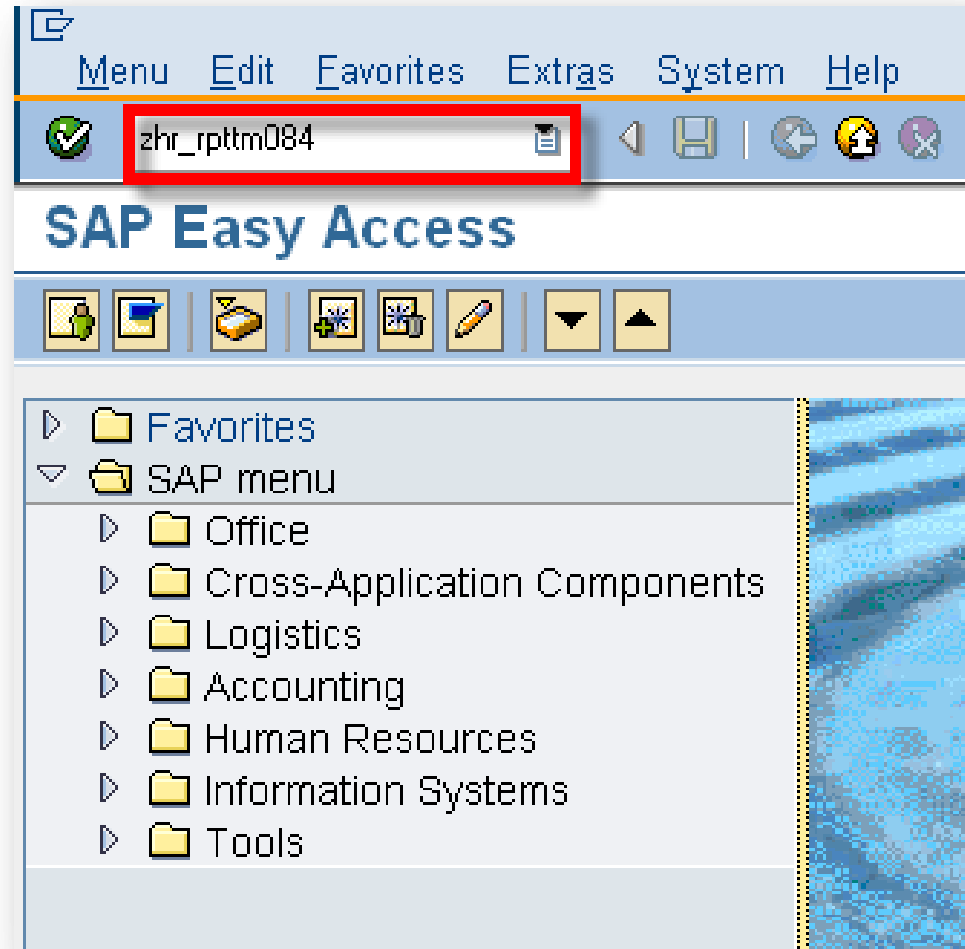
- Ability to view reports on demand.
- View online or choose to print.
- Customize for type of data you want to view/generate.
- Ability to export and manipulate data.
- Most information in real-time.




# Accessing / Viewing Reports

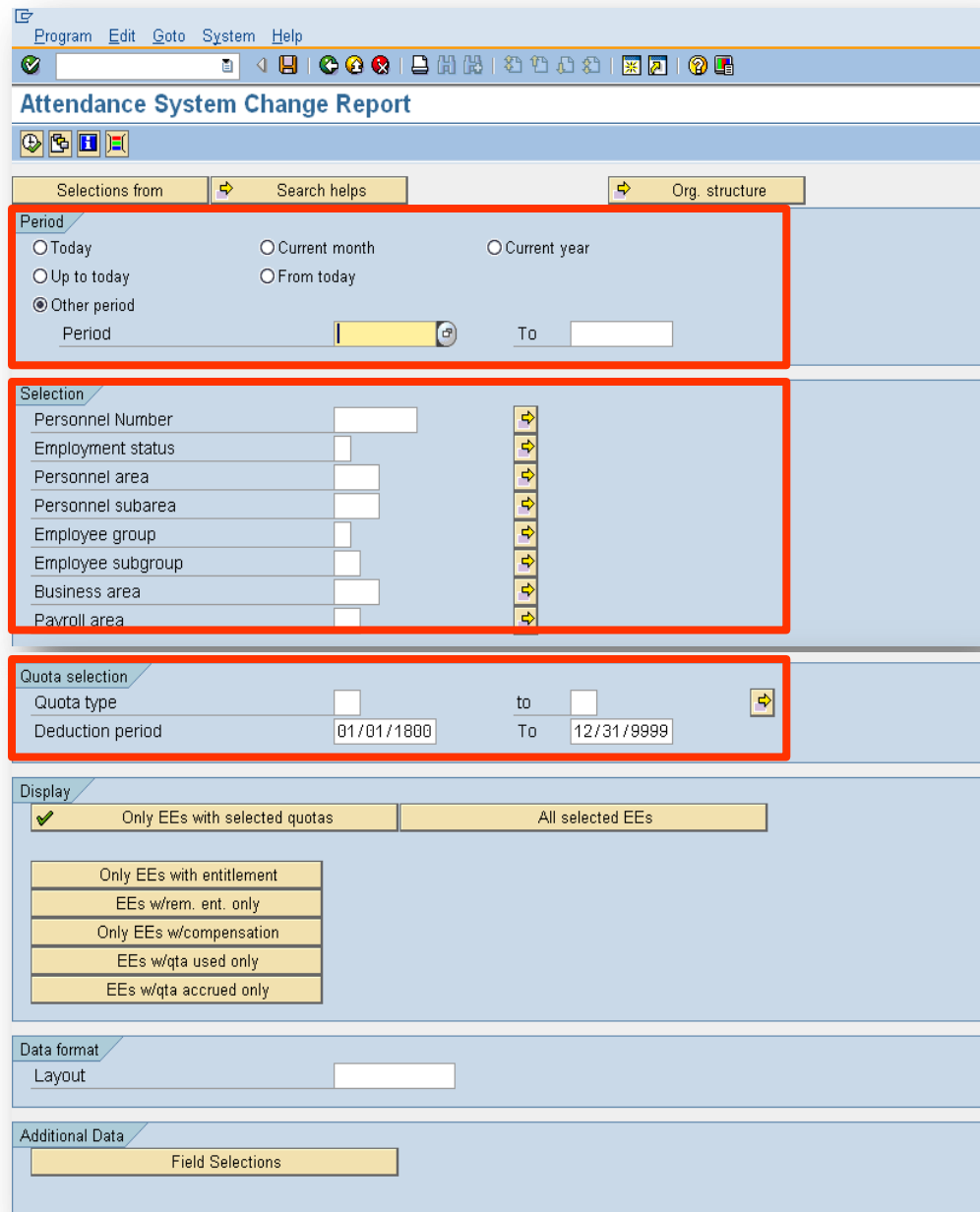
Your role determines which reports you can access and the data that displays within the report.

1. From the *SAP Easy Access* screen, type the transaction code in the **Command** field. (e.g. ZHR\_RPTTM084 – Attendance System Change Report )
2. Click  (**Enter**) to start transaction.



# Accessing / Viewing Reports

3. Select the criteria for your report.
  - Period (time frame)
  - Selection (personnel number, personnel area, etc.)
  - Quota selection (additional selection area)
4. Once selected, click  (**Execute**) to execute the report.



Program Edit Goto System Help

Attendance System Change Report

Selections from Search helps Org. structure

**Period**

☐ Today
 ☐ Current month
 ☐ Current year

☐ Up to today
 ☐ From today

☒ Other period
 Period  To

**Selection**

Personnel Number	<input type="text"/>	
Employment status	<input type="text"/>	
Personnel area	<input type="text"/>	
Personnel subarea	<input type="text"/>	
Employee group	<input type="text"/>	
Employee subgroup	<input type="text"/>	
Business area	<input type="text"/>	
Payroll area	<input type="text"/>	

**Quota selection**

Quota type  to

Deduction period  01/01/1800 To  12/31/9999

**Display**

☒ Only EEs with selected quotas
 ☐ All selected EEs

☐ Only EEs with entitlement  
☐ EEs w/rem. ent. only  
☐ Only EEs w/compensation  
☐ EEs w/qta used only  
☐ EEs w/qta accrued only

**Data format**

Layout

**Additional Data**

Field Selections

# Printing and Variants


# Personal Printing Settings

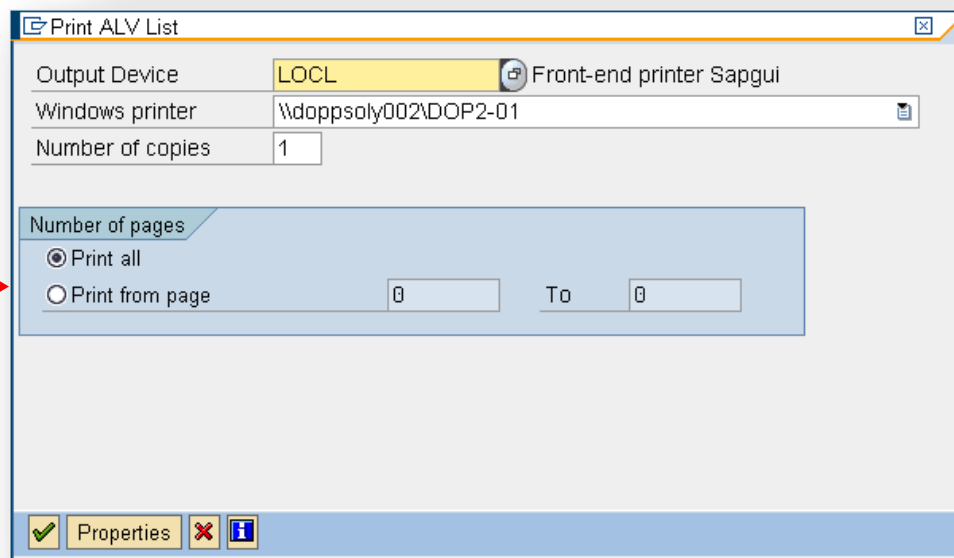
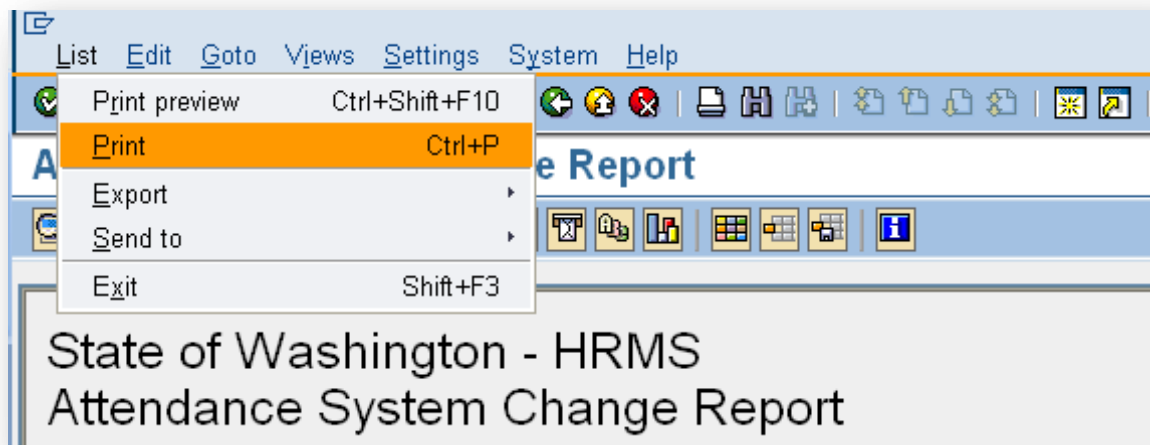
- End users will need default print settings established on their computer profile to enable printing from their local printer.
  - If the settings are not established on your computer, your print job will go to the system spool and will not print.
- Work with your agency's Help Desk or IT staff to establish your default print settings.



# Printing Reports

Once you have executed a report and have viewed the results, you can choose to print a copy.

1. From the menu bar, select List
2. Select Print
3. The Print ALV List window appears, confirm the correct printer is selected.
4. Enter number of copies
5. Click  (Enter)





# Report Variant


- A **Variant** is a report where one or more selected criteria is saved as a parameter.
  - Use variants to access frequently used/common reports.
  - Eliminates redundant data entry.
- Once you have accessed a report you are able to save a variant.
- A list of statewide variants is located on the Customer Support page by selecting HRMS Resources.
  - **Statewide Variant List**: DOP created this list to assist agencies in identifying statewide variants. The spreadsheet has several worksheets. The first worksheet lists **ALL statewide variants**.

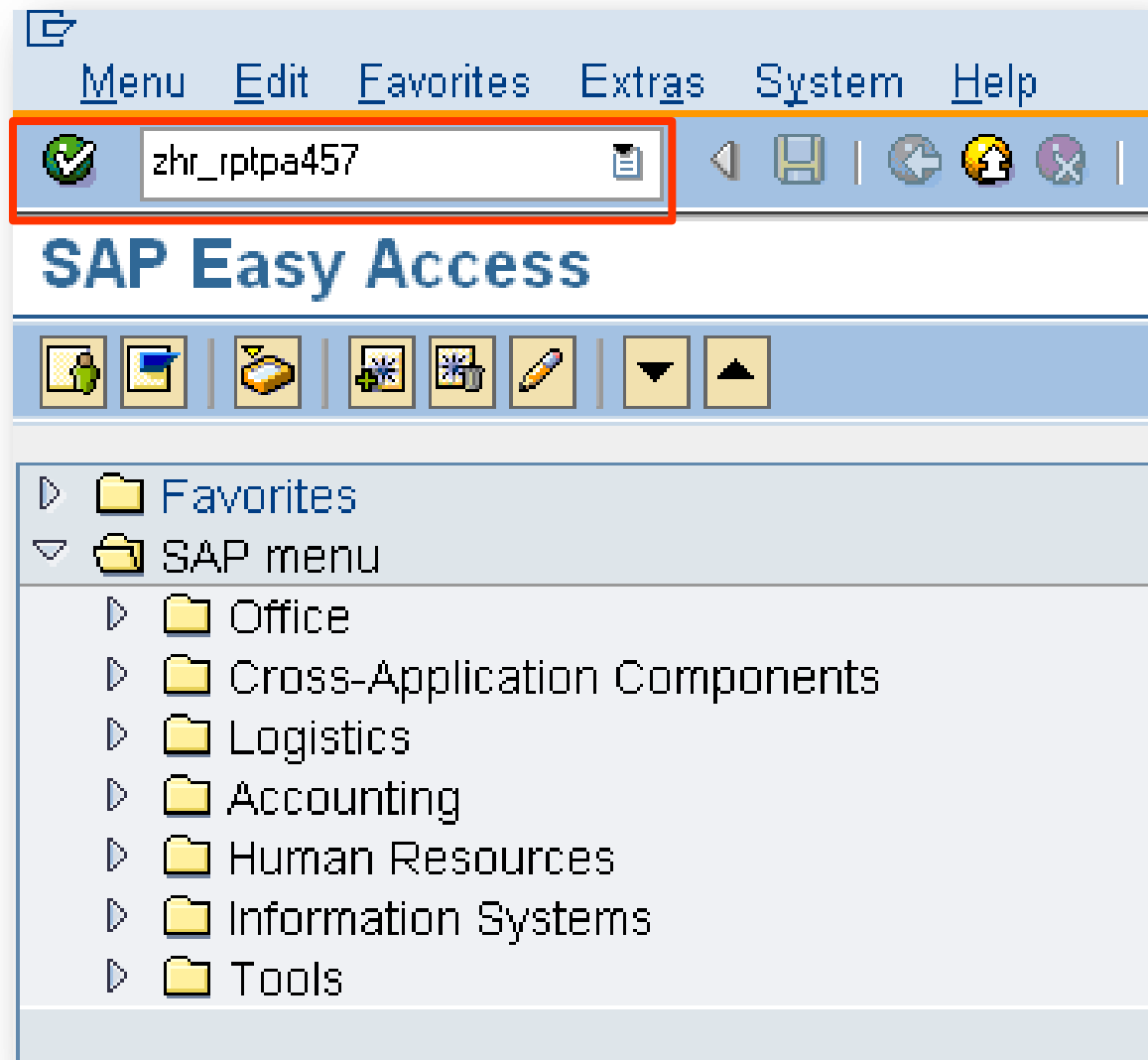
Note: Be sure to review state-wide variants (swv) before creating new ones.

# Create/Save a Variant

# Creating a Variant

To create a Variant, a report transaction code is required.

- Enter a transaction code in the Command field.
- Click  (Enter) to start the transaction.



# Creating a Variant

You must select fields (criteria) in order to save the variant.

- For this example we will select fields in these areas:

- Selection Criteria*
- Program selections*

There is no minimum or maximum number of criteria you can use to create a variant.

The more criteria used the more specific the report; less criteria, the more general the report.

The screenshot displays the 'Action Report' dialog box in SAP. The interface includes a menu bar (Program, Edit, Goto, System, Help) and a toolbar. The 'Selection Criteria' section is highlighted with a red box and contains the following fields:

Selection Criteria	Field	Action
Personnel Number	[Text Field]	[Arrow]
Employment Status	[Text Field]	[Arrow]
Personnel area	[Text Field]	[Arrow]
Personnel subarea	[Text Field]	[Arrow]
Employee group	[Text Field]	[Arrow]
Employee subgroup	[Text Field]	[Arrow]

The 'Program selections' section is also highlighted with a red box and contains the following fields:

Program selections	Field	Range	Action
Effective Date of Action	[Text Field]	to [Text Field]	[Arrow]
Action Type	[Text Field]	to [Text Field]	[Arrow]

The 'Output format' section is highlighted with a red box and contains the following field:

Output format	Field
<input checked="" type="radio"/> SAP List Viewer	[Text Field]

Refer to Variants\_Create and Retrieve in the OLQR

# Creating a Variant

In this example, a variant will be created for the *Action Report* (ZHR\_RPTPA457).

Used to identify all new hires in the agency.

Add entries in the *Selection Criteria* area and *Program selections* area.

- Personnel area

1110 – Dept. of Personnel

- Action Type

U0 New Hire to U6 Re-hire

The screenshot shows the SAP Action Report (ZHR\_RPTPA457) interface. The top menu bar includes Program, Edit, Goto, System, and Help. Below the menu bar is a toolbar with various icons. The main title is "Action Report". Below the title is a section for "Period" with a "Reporting Period" dropdown set to "Today". The "Selection Criteria" section is highlighted with a red box and contains the following fields:

Selection Criteria	Value	Direction
Personnel Number		→
Employment Status		→
Personnel area	1110	→
Personnel subarea		→
Employee group		→
Employee subgroup		→

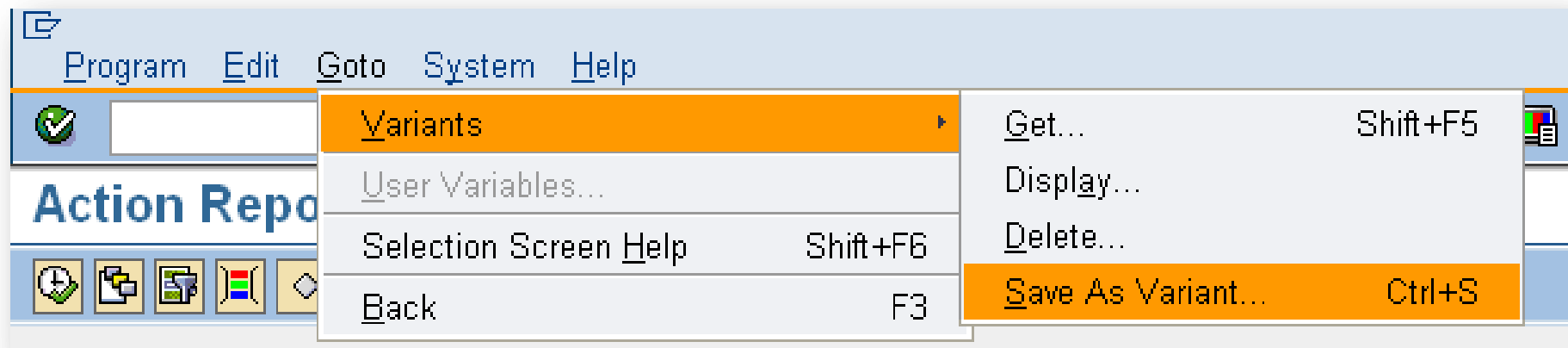
The "Program selections" section is also highlighted with a red box and contains the following fields:


Field	Value	Range	Direction
Effective Date of Action		to	→
Action Type	U0	to	U6

The "Output format" section is highlighted with a red box and contains a radio button for "SAP List Viewer".



# Saving a Variant

1. To save the report with your selected criteria, on the Menu Bar click **Goto → Variants → Save as Variant**

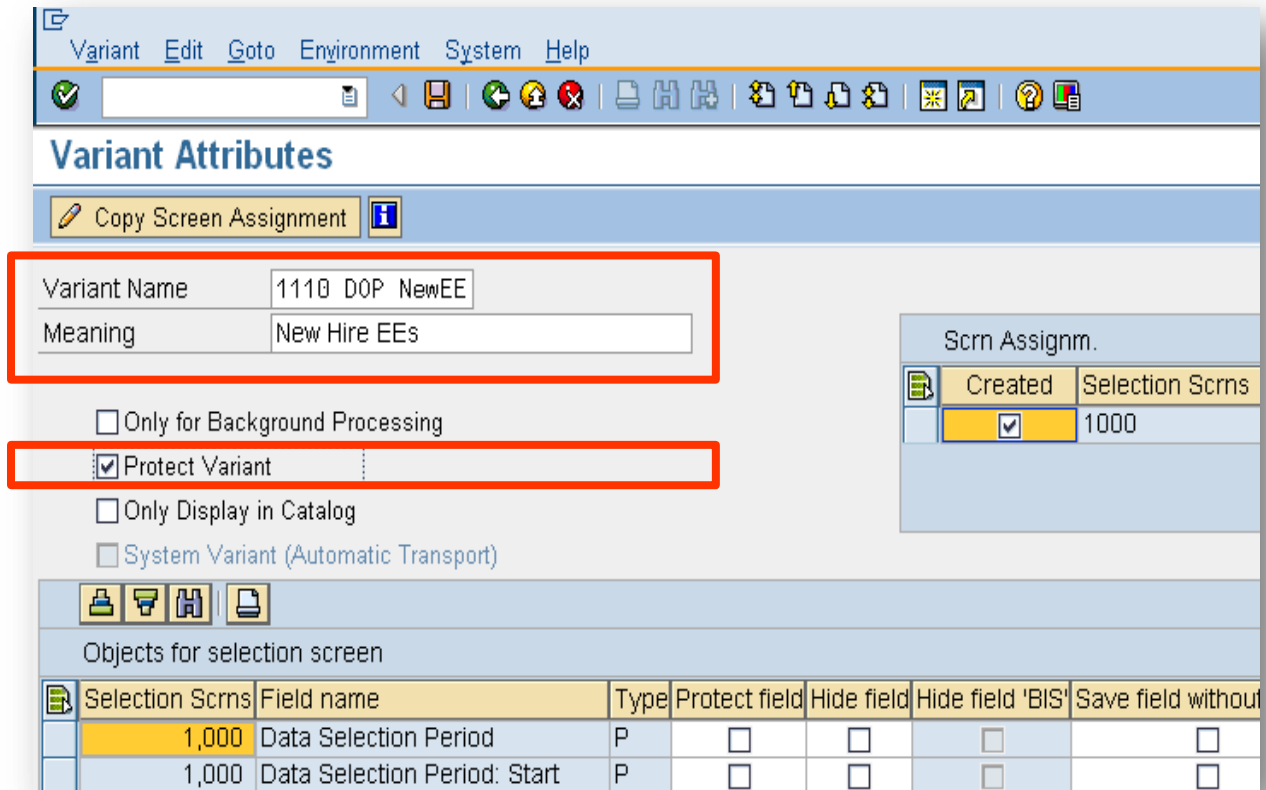


Note: You can also use [Ctrl + S] or click  (Save) to save a variant.

# Saving a Variant

2. Complete the *Variant Name* and *Meaning* fields
3. Click  (**Enter**) to validate the data
4. Click  (**Save**) to save the data

You will return to the report page



Variant Attributes

Copy Screen Assignment

Variant Name: 1110 DOP NewEE  
Meaning: New Hire EEs

☐ Only for Background Processing  
☒ Protect Variant  
☐ Only Display in Catalog  
☐ System Variant (Automatic Transport)

Scrn Assignm.

Created	Selection Scrns
1000	1000

Objects for selection screen

Selection Scrns	Field name	Type	Protect field	Hide field	Hide field 'BIS'	Save field without
1,000	Data Selection Period	P	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1,000	Data Selection Period: Start	P	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

 Variant 1110 DOP NEWEE saved

The variant was saved.  
Note the message in the status bar.

## Tip:

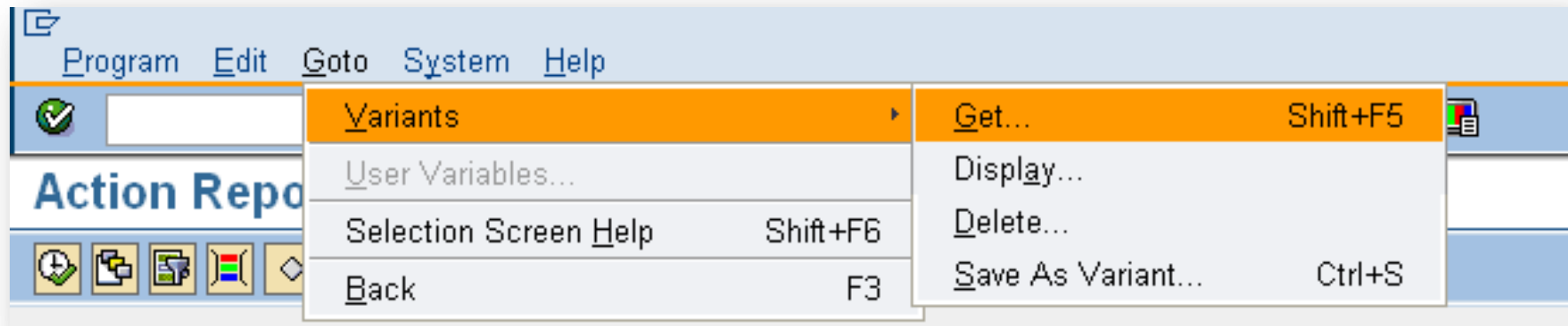
Clicking the Protect Variant box will help ensure that no one will save over your variant. This is optional.


# Retrieve a Variant





# Retrieve a Variant

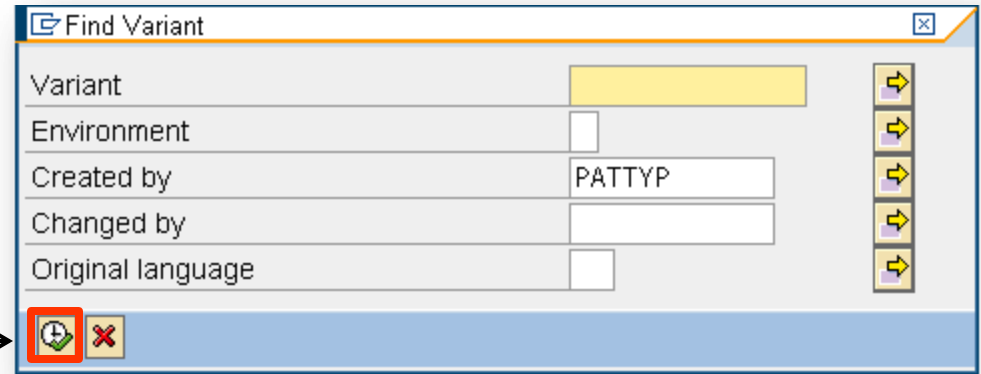
1. To retrieve a variant from the report screen click **Goto** → **Variants** → **Get**








Note: You can also click Shift + F5 or click the  (Get Variant) button to retrieve a variant.



# Retrieve a Variant

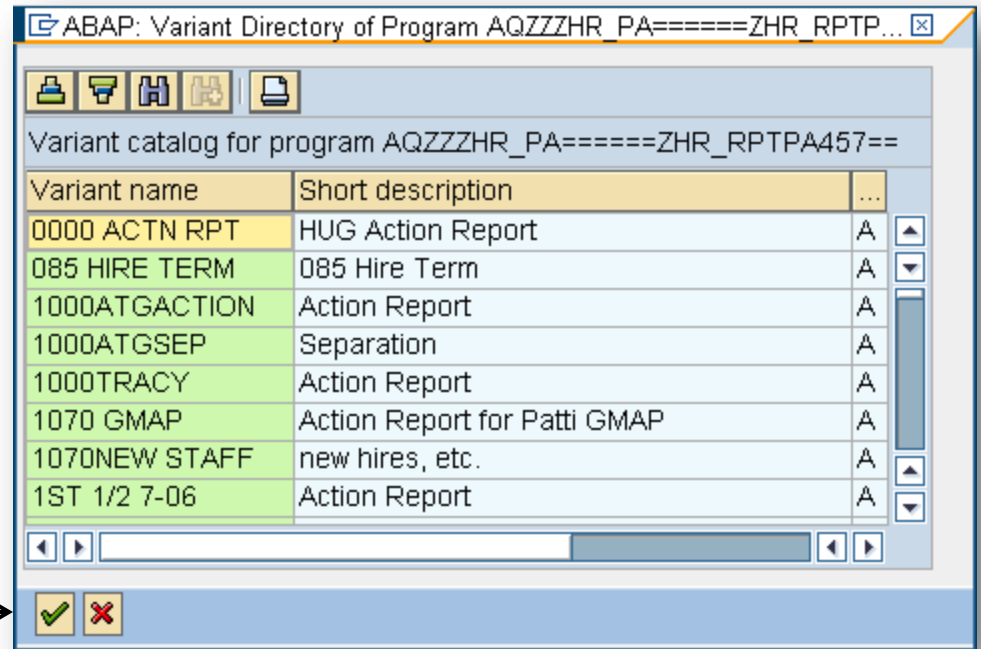
2. Click  (Execute) to search for the variants *you* created.
- Or
2. Remove your user name from the Created by field to see all variants created.
3. A pop-up box providing a list of variants appears. Double-click on the variant report that you want to retrieve. Or click once on the variant name, then click  (Choose) to bring your selection into the report screen.



Find Variant





Variant		
Environment		
Created by	PATTYP	
Changed by		
Original language		



 



ABAP: Variant Directory of Program AQZZZHR\_PA=====ZHR\_RPTPA457==

Variant catalog for program AQZZZHR\_PA=====ZHR\_RPTPA457==

Variant name	Short description		
0000 ACTN RPT	HUG Action Report	A	
085 HIRE TERM	085 Hire Term	A	
1000ATGACTION	Action Report	A	
1000ATGSEP	Separation	A	
1000TRACY	Action Report	A	
1070 GMAP	Action Report for Patti GMAP	A	
1070NEW STAFF	new hires, etc.	A	
1ST 1/2 7-06	Action Report	A	

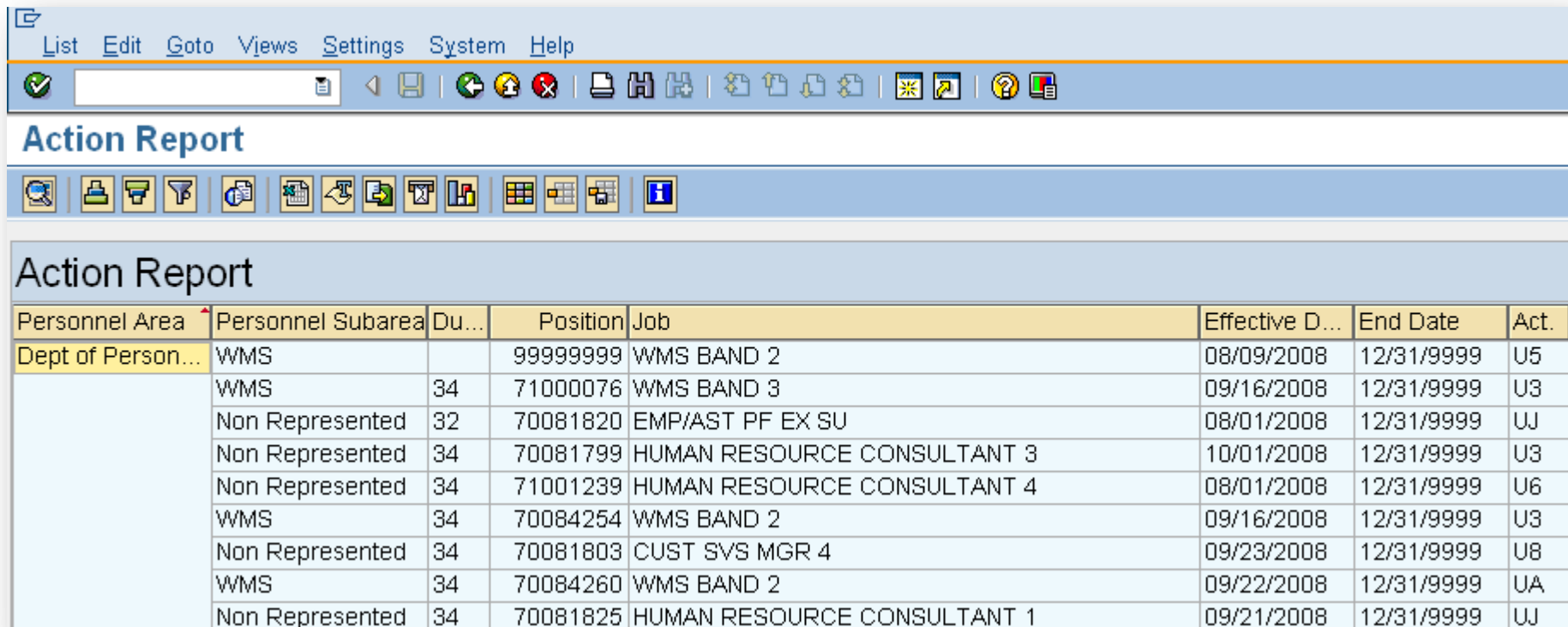
 

- Adding selection criteria will not change the saved variant settings. This is for a one-time selection.
- To keep the additional criteria selections, resave the variant.

**HR**  
State of Washington

# Retrieve a Variant

- The requested report is generated based on the selection criteria outlined in the variant.
- At this time you would verify the report information and utilize the report as desired.



**Action Report**

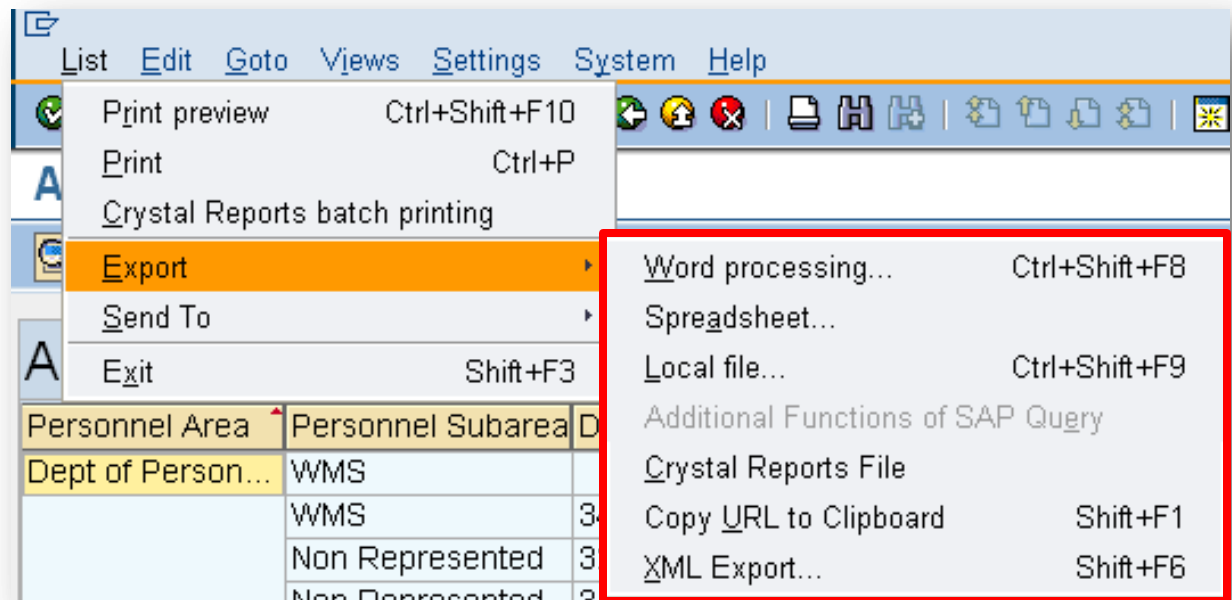
Personnel Area	Personnel Subarea	Du...	Position	Job	Effective D...	End Date	Act.
Dept of Person...	WMS		99999999	WMS BAND 2	08/09/2008	12/31/9999	U5
	WMS	34	71000076	WMS BAND 3	09/16/2008	12/31/9999	U3
	Non Represented	32	70081820	EMP/AST PF EX SU	08/01/2008	12/31/9999	UJ
	Non Represented	34	70081799	HUMAN RESOURCE CONSULTANT 3	10/01/2008	12/31/9999	U3
	Non Represented	34	71001239	HUMAN RESOURCE CONSULTANT 4	08/01/2008	12/31/9999	U6
	WMS	34	70084254	WMS BAND 2	09/16/2008	12/31/9999	U3
	Non Represented	34	70081803	CUST SVS MGR 4	09/23/2008	12/31/9999	U8
	WMS	34	70084260	WMS BAND 2	09/22/2008	12/31/9999	UA
	Non Represented	34	70081825	HUMAN RESOURCE CONSULTANT 1	09/21/2008	12/31/9999	UJ

# Export a Report


# Exporting Report Data

Once you have run a report, use the menu bar to export data.

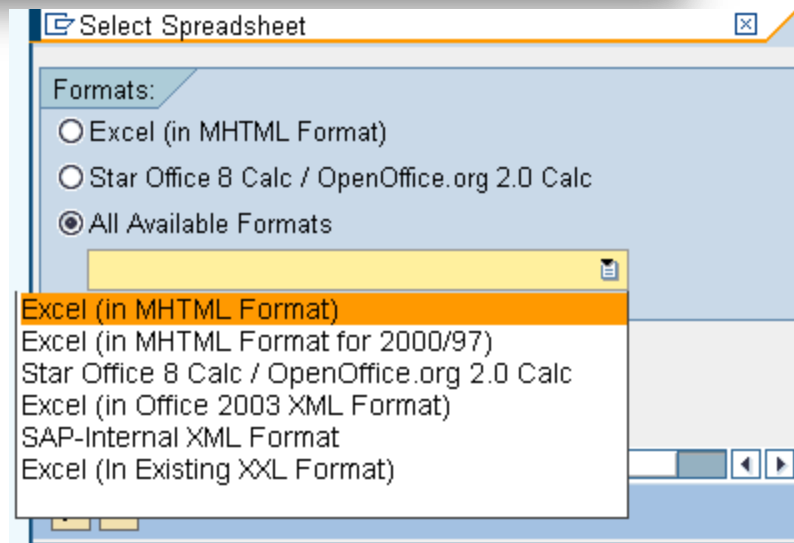
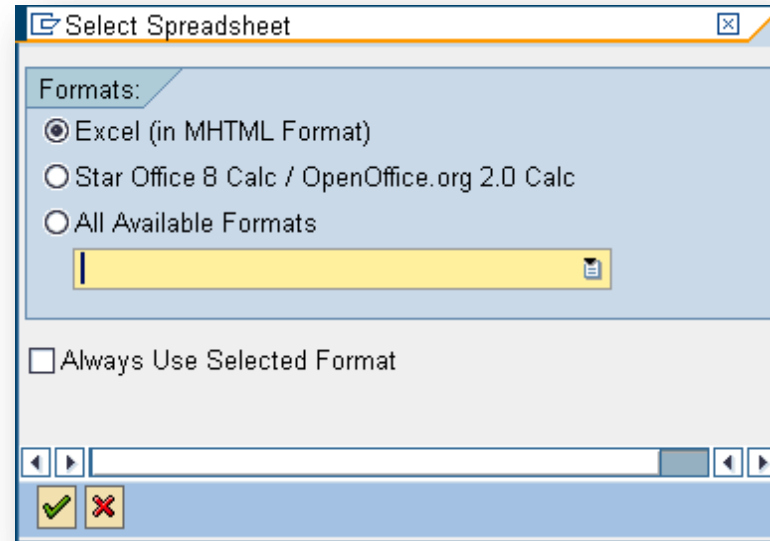
1. Select List then Export to select the type of file you want to create.



# Exporting Report Data (con't)

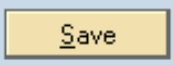
2. If you accept the default format - Excel (in MHTML Format) then, click (Continue)  move to the next step in exporting the report results.
3. If another format is needed click on All Available Formats to choose your desired format.

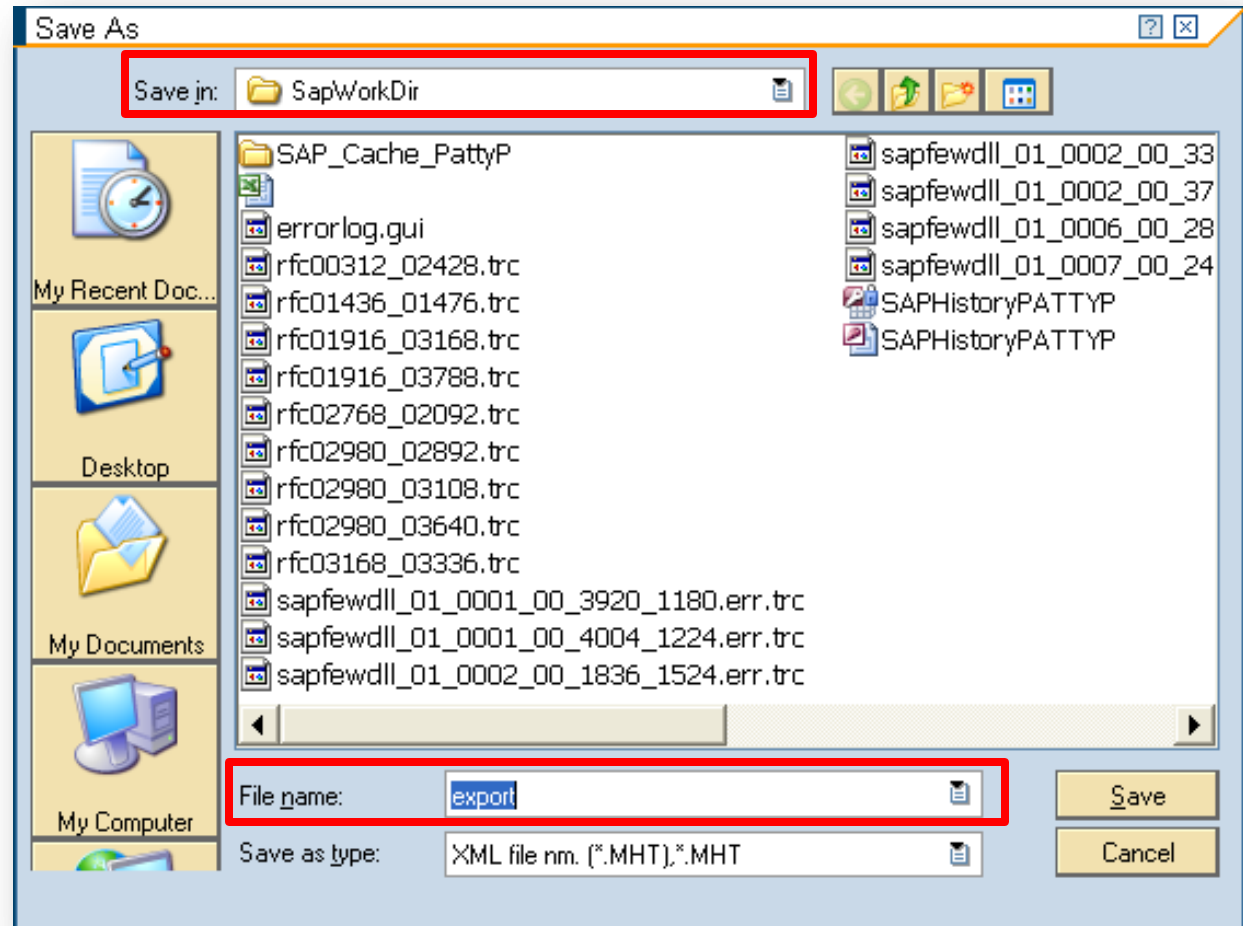
**MHTML** is short for MIME HTML which is a web page archive format.



# Exporting Report Data (con't)

If the Excel (in MHTML Format) was selected.

1. Identify the location to save the file and the file name.
2. Click  (Save) icon to save the file.





# Exporting Report Data

The format that you previously selected (ex: Excel) will open displaying the report results.

Save!

Name and save this spreadsheet before you exit, otherwise data will be lost.

test for upgrade - 1

Home Insert Page Layout Formulas Data Review View Developer Add-Ins

Paste Clipboard Font Alignment General Number

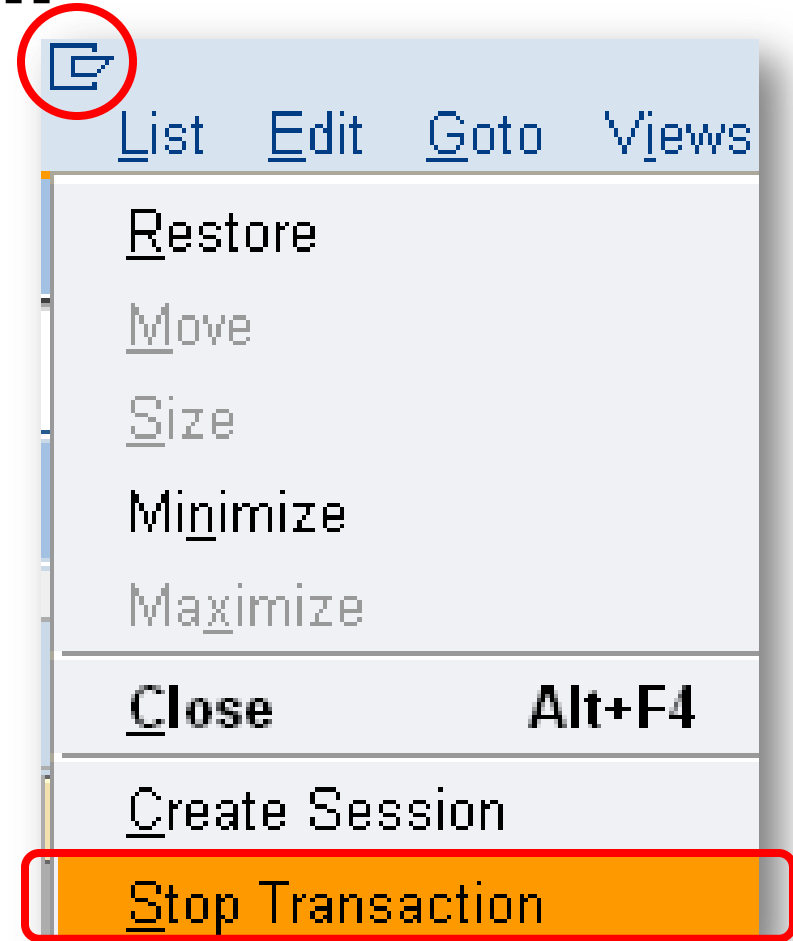
Arial 10 B I U Wrap Text Merge & Center

I15 Reassignment

	A	B	C	D	E
1	Personnel Area	Personnel Subarea	Duty	Position	Job
2	Dept of Personnel	WMS		99999999	WMS BAND 2
3	Dept of Personnel	WMS	34	71000076	WMS BAND 3
4	Dept of Personnel	Non Represented	32	70081820	EMP/AST PF EX SU
5	Dept of Personnel	Non Represented	34	70081799	HUMAN RESOURCE CONSULTANT 3
6	Dept of Personnel	Non Represented	34	71001239	HUMAN RESOURCE CONSULTANT 4
7	Dept of Personnel	WMS	34	70084254	WMS BAND 2
8	Dept of Personnel	Non Represented	34	70081803	CUST SVS MGR 4
9	Dept of Personnel	WMS	34	70084260	WMS BAND 2
10	Dept of Personnel	Non Represented	34	70081825	HUMAN RESOURCE CONSULTANT 1
11	Dept of Personnel	WMS	34	70005878	WMS BAND 2
12	Dept of Personnel	Non Represented		99999999	HUMAN RESOURCE CONSULTANT 3
13	Dept of Personnel	Non Represented	34	70084256	HUMAN RESOURCE CONSULTANT ASSTISTANT 2
14	Dept of Personnel	Non Represented	34	70084257	HUMAN RESOURCE CONSULTANT 4
15	Dept of Personnel	WMS	34	70084258	WMS BAND 2

# Stopping a Transaction

1. To end a report before it has completed, you can stop the transaction
2. From the Menu bar click the square in the uppermost left corner
3. Click **Stop transaction**



**Note:** Once selected, you will be taken directly to the SAP Easy Access screen.

## Exporting Report Data Activity – Page 12



# Section Review

1. What are the 3 types of HRMS reports?

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

2. What determines your access to certain reports?

---

---

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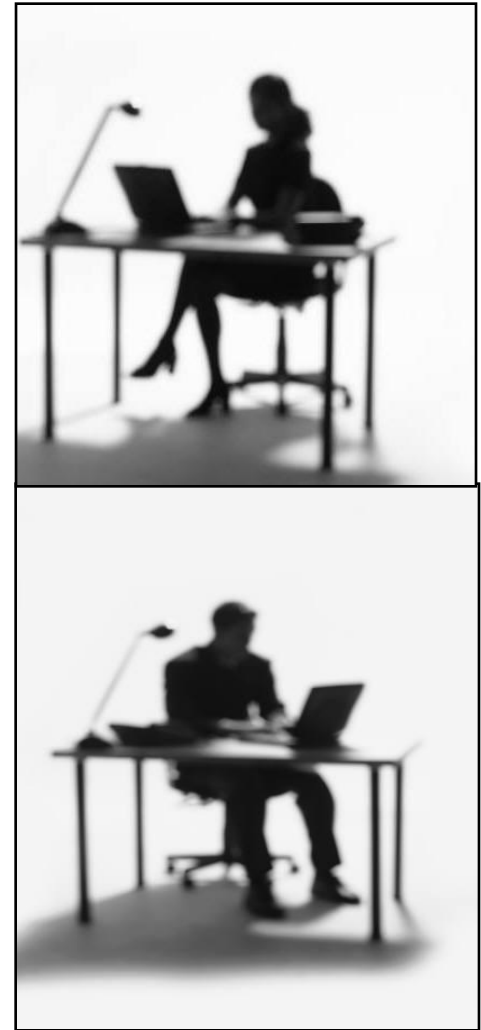
# Inquiries and Practice

# Inquiries and Practice

When you get back to your office, take the opportunity to complete more activities that bring together the concepts that you have learned in HRMS Basics training.

Use the Practice Activities that are in the Activity Guide along with the additional activities at the end of the Activity Guide.

- **Activity 8 – Viewing Employee Information**
- **Activity 9 – Viewing Basic Payroll Information**



# Inquiries and Practice

As you complete each activity remember that these additional resources are available to assist you:

- HRMS Job Aids
- HRMS Training Guide
- HRMS Activity Packet
- OLQR User Procedures



# New! HRMS Data Definitions

The OLQR website leads you to a link ([HRMS Data Definitions Project](#)) that provides agencies with standard definitions of HRMS field names and dropdown list definitions.

Washington State Department of Personnel

Home Strategic HR Compensation & Job Classes Training Recruitment Rules Diversity Payroll More DOP Services

Home > Payroll > Human Resource Management System > On-Line Quick Reference [Print Friendly](#)

**Payroll - HRMS**

- HRMS Support
- Payroll Calendars & Schedules
- HRMS Training
- On-Line Quick Reference**
- Personnel/Payroll Association

### On-Line Quick Reference

The On-Line Quick Reference (OLQR) contains instructional materials to help you perform day-to-day tasks in the Human Resource Management System (HRMS).

It is organized by functional areas and roles, job aids, HRMS reports, user procedures, course manuals, and glossary.

- [Functional Areas and Roles](#)
- [Job Aids](#)
- [HRMS Reports](#)
- [User Procedures](#)
- [Course Manuals](#)
- [Glossary](#)

**HRMS Data Definitions Project » - New!**

Search OLQR

**Portal Access**  
[HRMS/BI Portal \(SSO\)](#)  
[HRMS/BI Portal \(All\)](#)

**Related Documents**  
[HRMS Upgrade Impacts](#)

**Contact Us**  
 360-664-6400 or [E-Mail](#)

**Data Definitions Website address:**

<http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/HRMSDataDefinitions.aspx>



# Training Tools

- **HRMS On-line Quick Reference (OLQR):** On-line help that provided you with step-by-step instructions designed to help you complete tasks in HRMS.

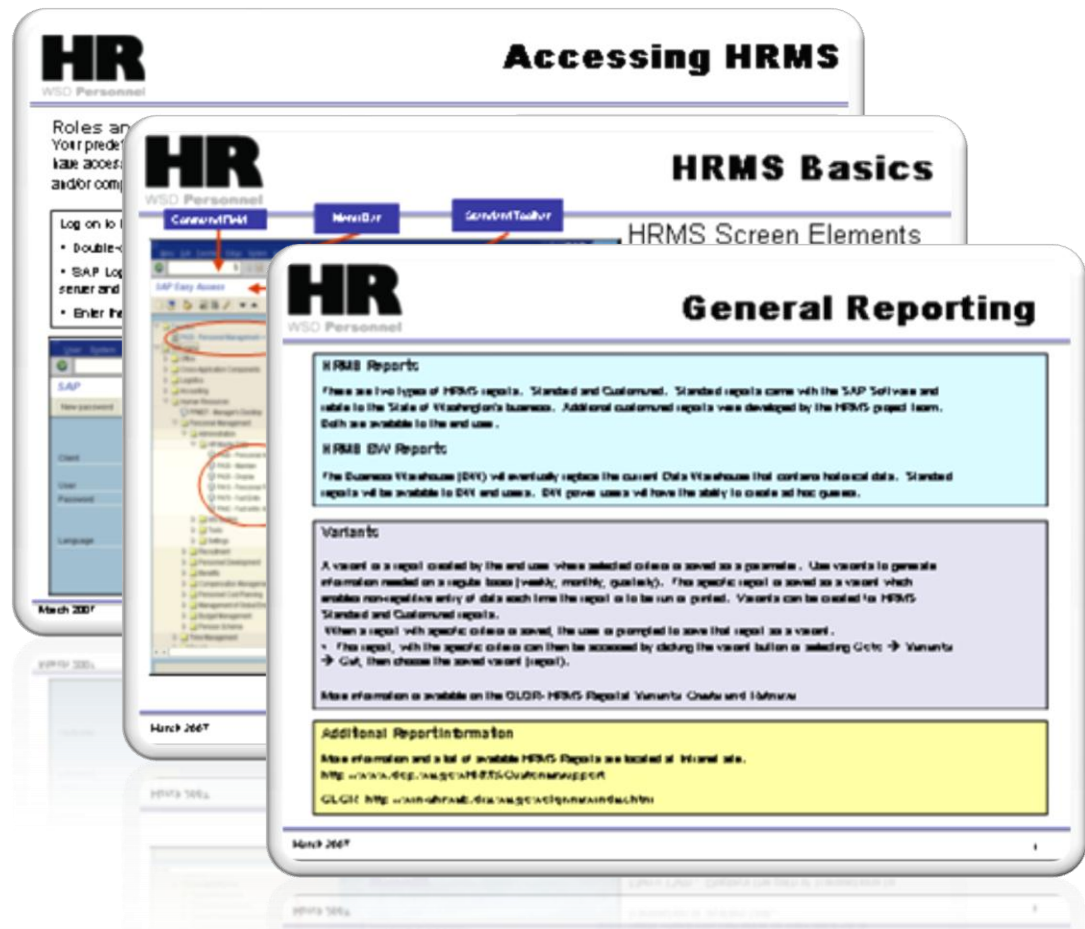


Web address: <http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/default.aspx>

# Job Aids

The following job aids are available to you and are applicable to this course:

- Accessing HRMS
- HRMS Basics
- General Reporting



Web address:

<http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/default.aspx>

# DOP Service Center

The **DOP Service Center** webpage is a point of contact for internal and external clients of DOP's Information systems, websites and internal networks.



The screenshot shows the Washington State Department of Personnel (DOP) website. The header includes the HR logo and navigation links: Contact DOP, About Us, Topic Index A-Z, Forms, Publications, and Calendar. A search bar with a GO button is also present. The main navigation menu includes Home, Strategic HR, Compensation & Job Classes, Training, Recruitment, Rules, Diversity, Payroll, and More DOP Services. The left sidebar highlights the Payroll - HRMS section, with links to HRMS Support, Payroll Calendars & Schedules, HRMS Training, On-Line Quick Reference, and Personnel/Payroll Association. The main content area displays the DOP Service Center page, which includes a breadcrumb trail: Home > Payroll > Human Resource Management System > HRMS Support > DOP Service Center. The page title is "DOP Service Center". The text describes the center as the point of contact for internal and external users of the DOP, aiming to provide reliable solutions and high quality customer service. It mentions that Customer Service Specialists are available to provide support and resolution to reported incidents by end users while also building a knowledge base of issues and solutions for future reference. The page also includes a section titled "When to Ask for Help" which advises users not to continue using the "best guess method" if they are unsure how to complete a transaction, as this can create a complex situation and be difficult to unravel. The importance of this history grows even more due to the automation of retroactive transactions.

Web address:

<http://www.dop.wa.gov/payroll/HRMS/HRMSSupport/Pages/DOPServiceCenter.aspx>

# HRMS Message Center

- When system related information needs to be communicated to HRMS users, the DOP Service Center transmits a ZAlert that instructs user to access the HRMS message center for an update.
- Messages can be accessed through the DOP website

The screenshot shows the HRMS Message Center interface. At the top, there's a navigation bar with links: Contact DOP | About Us | Topic Index A-Z | Forms | Publications | Calendar. Below this is the Washington State Department of Personnel logo and a search bar with a GO button. A secondary navigation bar includes links: Home, Strategic HR, Compensation & Job Classes, Training, Recruitment, Rules, Diversity, Payroll, and More DOP Services. The main content area is titled 'Message Center' and explains that it provides system-related messages for professional users. It mentions that urgent issues are communicated via ZAlerts. A list of message types includes: notification of issues requiring immediate action, system updates, and changes in system availability. On the right, there's a 'Related Documents' section with links to archived messages from Nov-Dec 2008, July-Oct 2008, Jan-June 2008, Nov-Dec 2007, Jun-Oct 2007, Jan-May 2007, and Mar-Dec 2006. Below this is a 'Contact Us' section with the phone number 360-664-6400 and an E-Mail link. At the bottom, there's an 'HRMS Message Log' table with two entries: one from 08/06/2009 at 10:00 a.m. regarding payroll pickup, and another from 08/05/2009 at 5:20 p.m. regarding HRMS users.

Washington State  
Department of Personnel

Home Strategic HR Compensation & Job Classes Training Recruitment Rules Diversity Payroll More DOP Services

Home > Payroll > Human Resource Management System > HRMS Support > Message Center

## Message Center

The Human Resource Management System Message Center provides system related messages for professional users.

When an urgent issue or update needs to be communicated to HRMS users, HRMS Support transmits an on-line alert that instructs users to access the HRMS message center for an update.

The types of messages that could be logged in the message center also include:

- notification of issues that require **immediate** action
- system updates
- changes in system availability

### Related Documents

- » [Archived Messages](#)
- » [Nov-Dec 2008](#)
- » [July-Oct 2008](#)
- » [Jan-June 2008](#)
- » [Nov-Dec 2007](#)
- » [Jun-Oct 2007](#)
- » [Jan-May 2007](#)
- » [Mar-Dec 2006](#)

### Contact Us

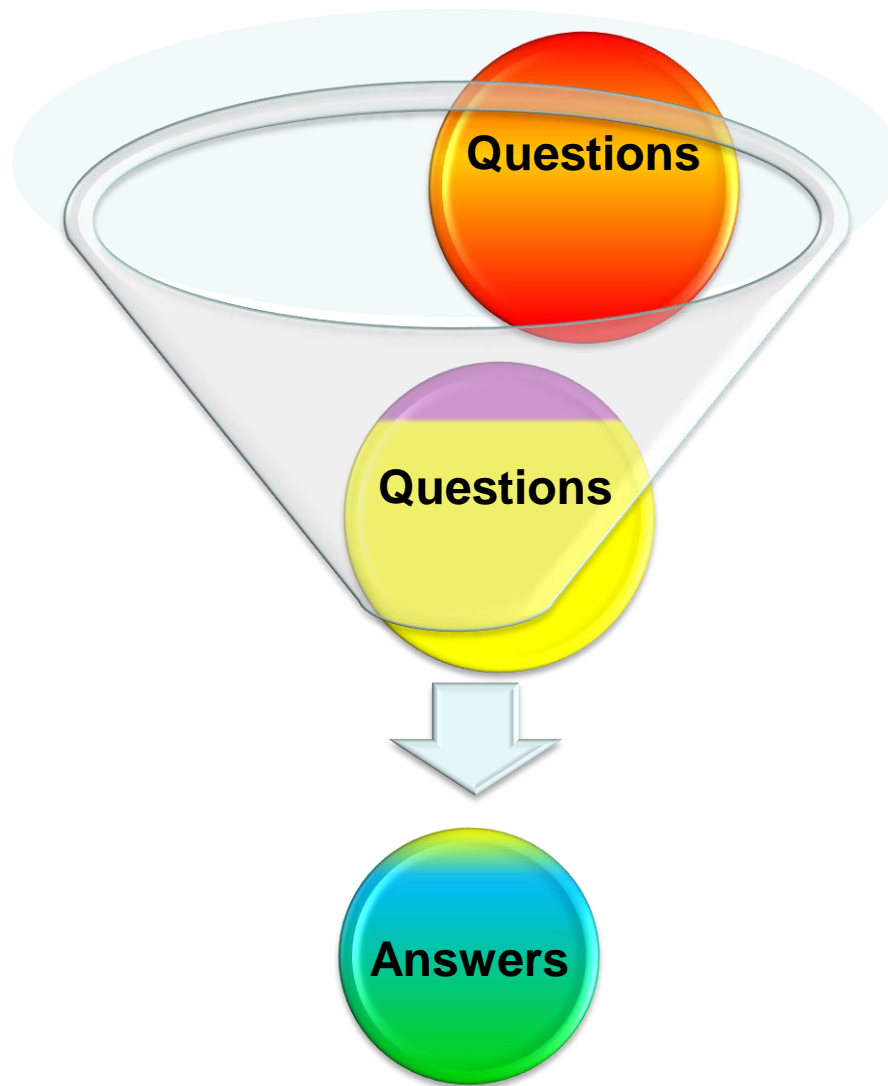
360-664-6400 or [E-Mail](#)

Date/Time	HRMS Message Log
08/06/2009 10:00 a.m.	<p><b>Attention HRMS HR and Payroll Offices:</b></p> <p>Payroll is ready for pickup at DIS from 10:00 to 11:00 a.m. It will be available at the Office of the State Treasurer at 11:30 a.m.</p> <p>Thank you.</p>
08/05/2009 5:20 p.m.	<p><b>Attention HRMS Users:</b></p>

Web address:

<http://www.dop.wa.gov/PAYROLL/HRMS/HRMSSUPPORT/Pages/MessageCenter.aspx>

# Question and Answer



# Training Evaluation

- Please take a few minutes to complete the (2 page) course evaluation.

TECHNICAL DEVELOPMENT | ORGANIZATIONAL & EMPLOYEE DEVELOPMENT SERVICES

**HR Evaluation**  
Personnel

Thank you for your recent course participation. Please help us to keep our services valuable by providing feedback.

Participant: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
 Email Address: \_\_\_\_\_  
 Course Title: \_\_\_\_\_  
 Instructor: \_\_\_\_\_  
 Course Date(s): \_\_\_\_\_

**About the course/instructor ...**

1 This course had a good balance of lecture and discussion. \_\_\_\_\_  
 1 2 3 4 5 6 7  
 Strongly Disagree No Opinion Strongly Agree

2 Please rate the effectiveness of the course materials as learning tools. \_\_\_\_\_  
 1 2 3 4 5 6 7  
 Fair Satisfactory Outstanding

3 Please evaluate the instructor's responsiveness to participant needs and questions. \_\_\_\_\_  
 1 2 3 4 5 6 7  
 Fair Satisfactory Outstanding

4 The instructor provided information in a manner that supported my learning. \_\_\_\_\_  
 1 2 3 4 5 6 7  
 Strongly Disagree No Opinion Strongly Agree

5 Please rate the overall quality of this course. \_\_\_\_\_  
 1 2 3 4 5 6 7  
 Fair Satisfactory Outstanding

**About participant learning ...**

This course helped me to strengthen my position competencies\*. \_\_\_\_\_  
 1 2 3 4 5 6 7  
 Strongly Disagree No Opinion Strongly Agree

2 Which of your position competencies were strengthened as a result of taking this class?  
 \_\_\_\_\_  
 \_\_\_\_\_

3 Estimate the percent of competencies learned that you will be able to apply to...  
 Your current job. \_\_\_\_\_  
 1 2 3 4 5  
 10% 20% 30% 40% 50%

Your career advancement. \_\_\_\_\_  
 1 2 3 4 5  
 10% 20% 30% 40% 50%

4 Classroom set-up was appropriate for my learning style/needs? ☐ Yes ☐ No

5 What is one thing that we could do to improve your learning environment in this facility?  
 \_\_\_\_\_  
 \_\_\_\_\_

\*Competencies are all of the skills, abilities, knowledge and behaviors applicable to your position.

Please See Other Side

Your visitor badge can be returned to the  
**Front Desk** or the **Bin** attached to the  
window on your way out.

**Thank you**

for your participation